Virginia Information Technologies Agency

VITA IT Asset Inventory System

expect the best

February 6, 2006

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Introduction

Welcome to the VITA IT Asset Inventory System, a comprehensive Inventory Management application that uses basic Windows navigation, buttons and tools. The VITA IT Asset Inventory System consists of five major areas:

- The Upload Area
- The Add Asset Area
- The Staging Area
- The Production Area
- The Extract Area

The VITA IT Asset Inventory System allows users to:

- Upload comma delimited electronic (.csv) files to the Staging Area
- Add, view and update asset data within the Staging Area
- Move Asset data into Production once the data has been validated
- View and update asset data within the Production database

Users will be required to ensure their asset data meets all requirements prior to the data being loaded into the "Production Area". A "Staging Area" is provided to assist users with the initial upload/validation process. After all data has been validated in the Staging Area, users may move their asset data into the Production Database.

All electronic asset files must conform to specific file layouts and must be in a comma delimited (.CSV) file format. File layouts, business rules, and additional detailed application information can be found in the Comprehensive VITA IT Asset Inventory Workbook, a link within VITA website - http://www.vita.virginia.gov/docs/itAssetInventory.cfm.

For comments, questions or suggestions, please call the VCCC or e-mail the VITA IT Asset Inventory Manager at AssetManager@vita.virginia.gov.

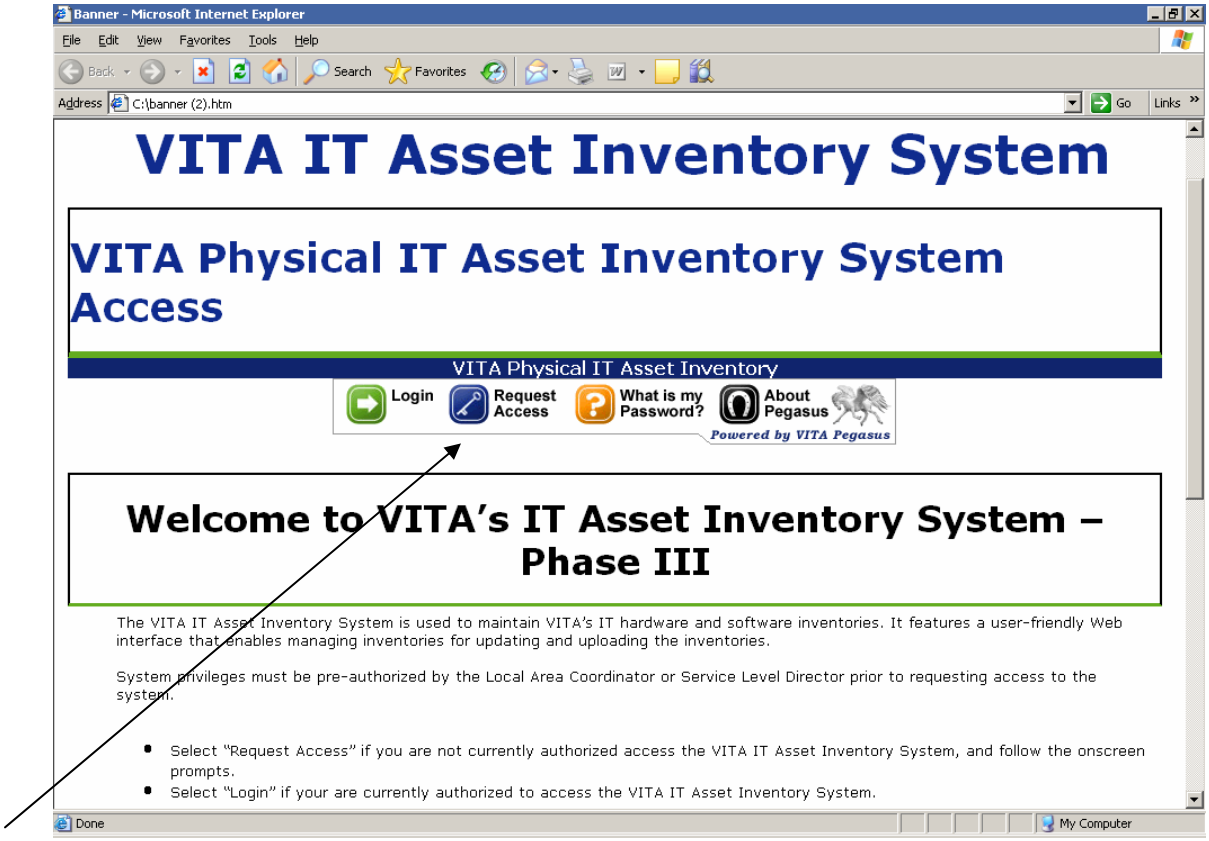
SYSTEM ACCESS

To access the VITA IT Asset Inventory System:

1. Send the VITA IT Asset Inventory Manager an email from your supervisor authorizing your use of the system. Please send to: AssetManager@vita.virginia.gov).

2. Go to the Vita Application Website - https://ssl01.vita.virginia.gov/SecureApps/AssetInventory/banner.aspx

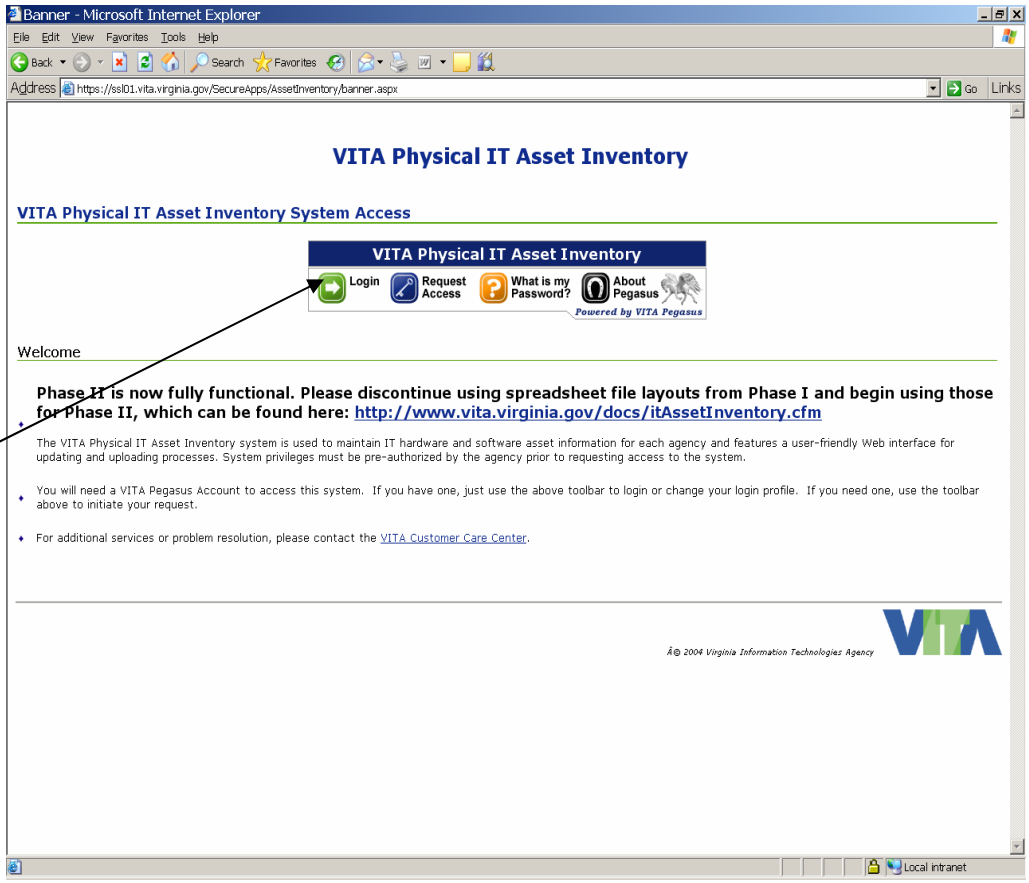
3. Select the **REQUEST ACCESS** icon and follow the onscreen instructions.



IT Asset Inventory Banner

LOGIN

Select the **LOGIN** icon via the url: https://ssl01.vita.virginia.gov/SecureApps/AssetInventory/banner.aspx

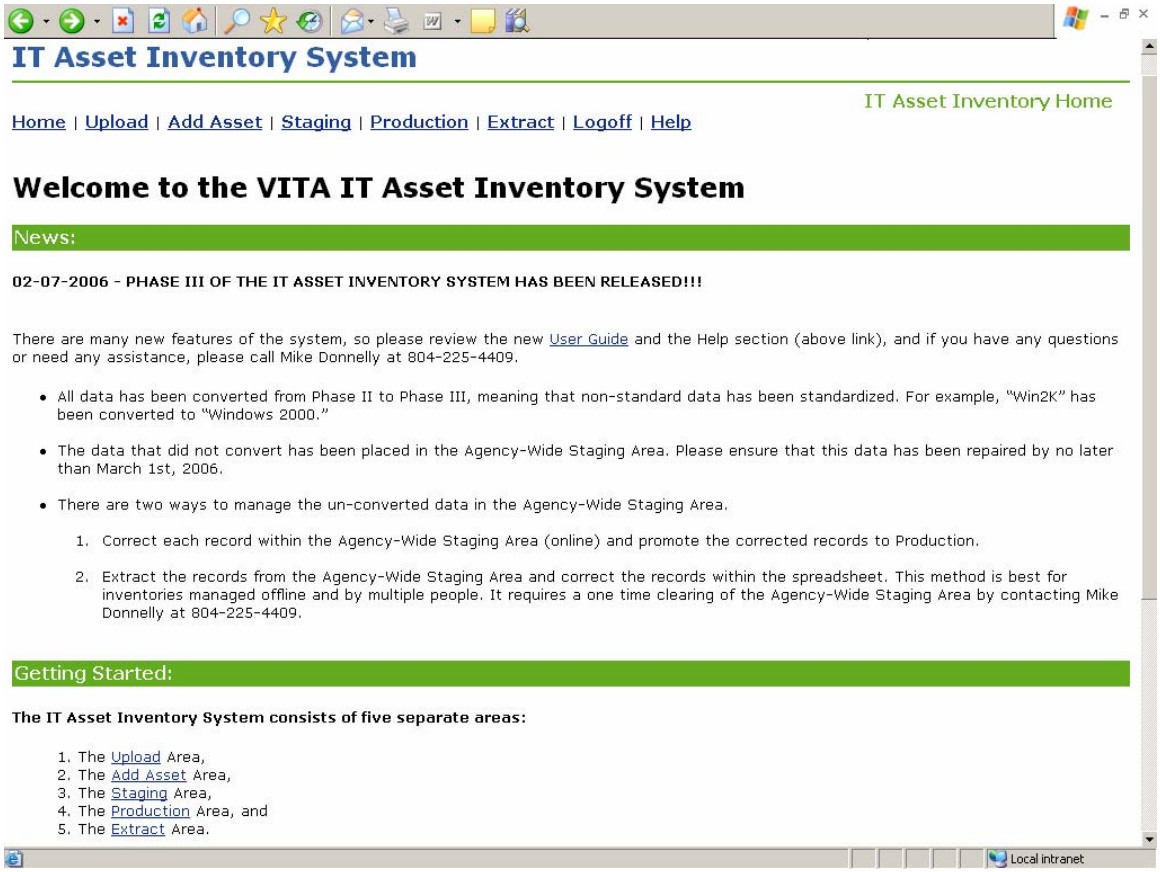


IT Asset Inventory Login

HOME PAGE

Upon successful login to the VITA IT Asset Inventory System, the HOME PAGE of the IT Asset Inventory System will be displayed. The 'Getting Started' section of the Home Page contains the five major areas in the application.

- The UPLOAD Area
- The ADD ASSET Area
- The STAGING Area
- The PRODUCTION Area
- The EXTRACT Area

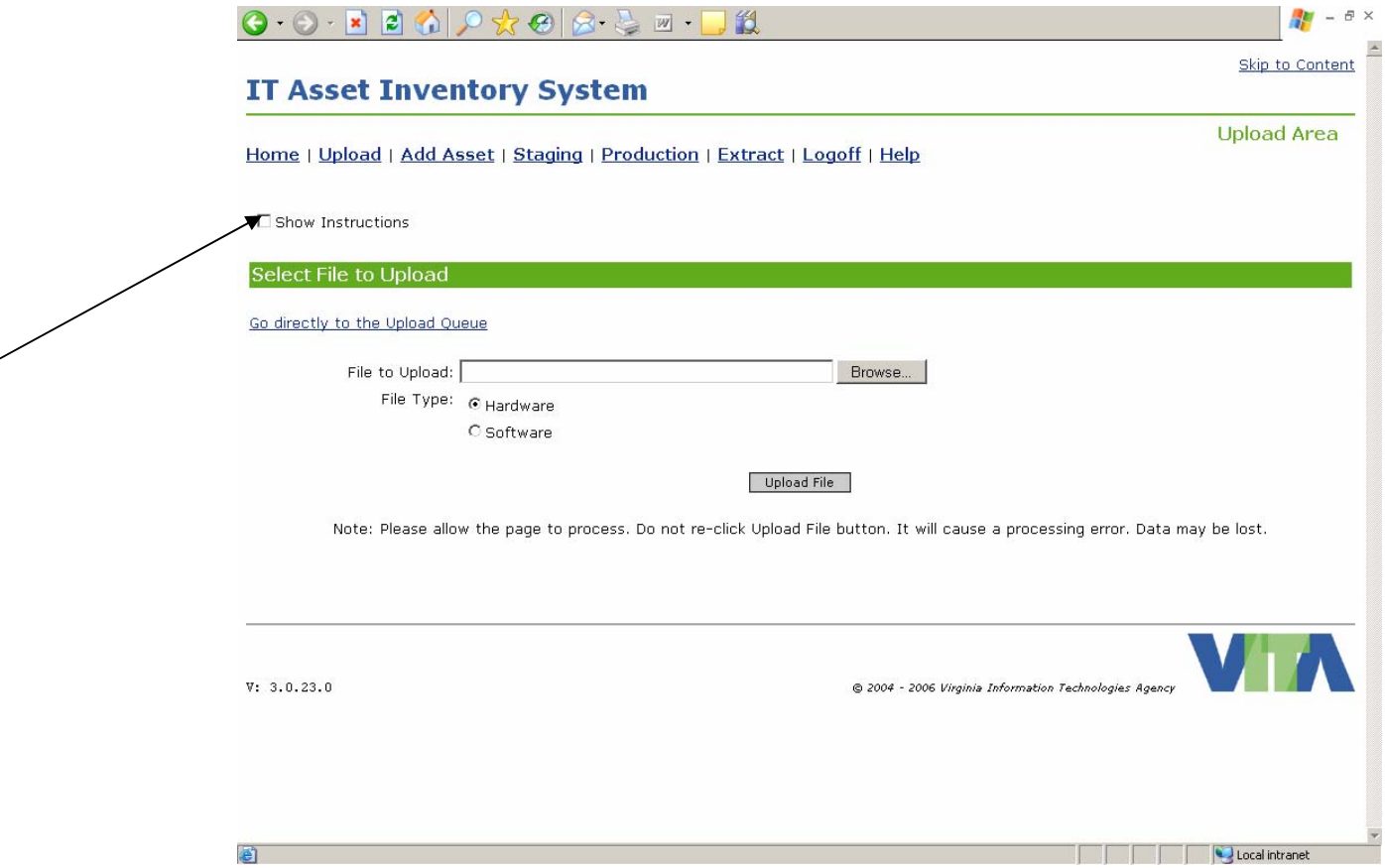


IT Asset Inventory Home

The **NEWS** section at the top of the IT Asset Inventory Home page, displays information and additional details about the system and software application upgrades.

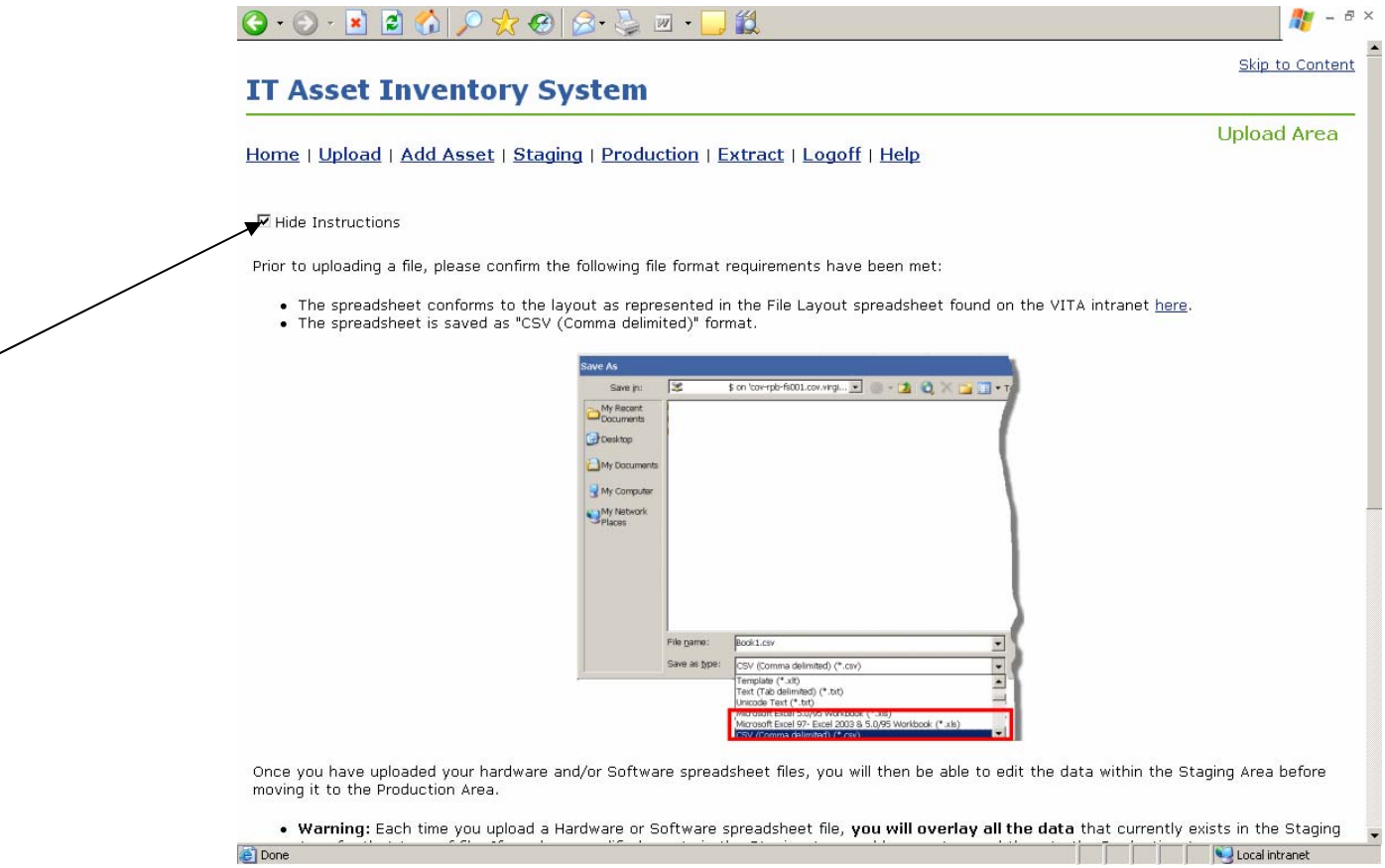
UPLOAD AREA

The UPLOAD Area allows you to load hardware and software assets into the IT Asset Inventory system using comma delimited (.CSV) formatted files. The same file may be loaded multiple times with each upload overlaying (replacing) all data that exists in the My Staging Area for the same assets being uploaded.



IT Asset Inventory Upload

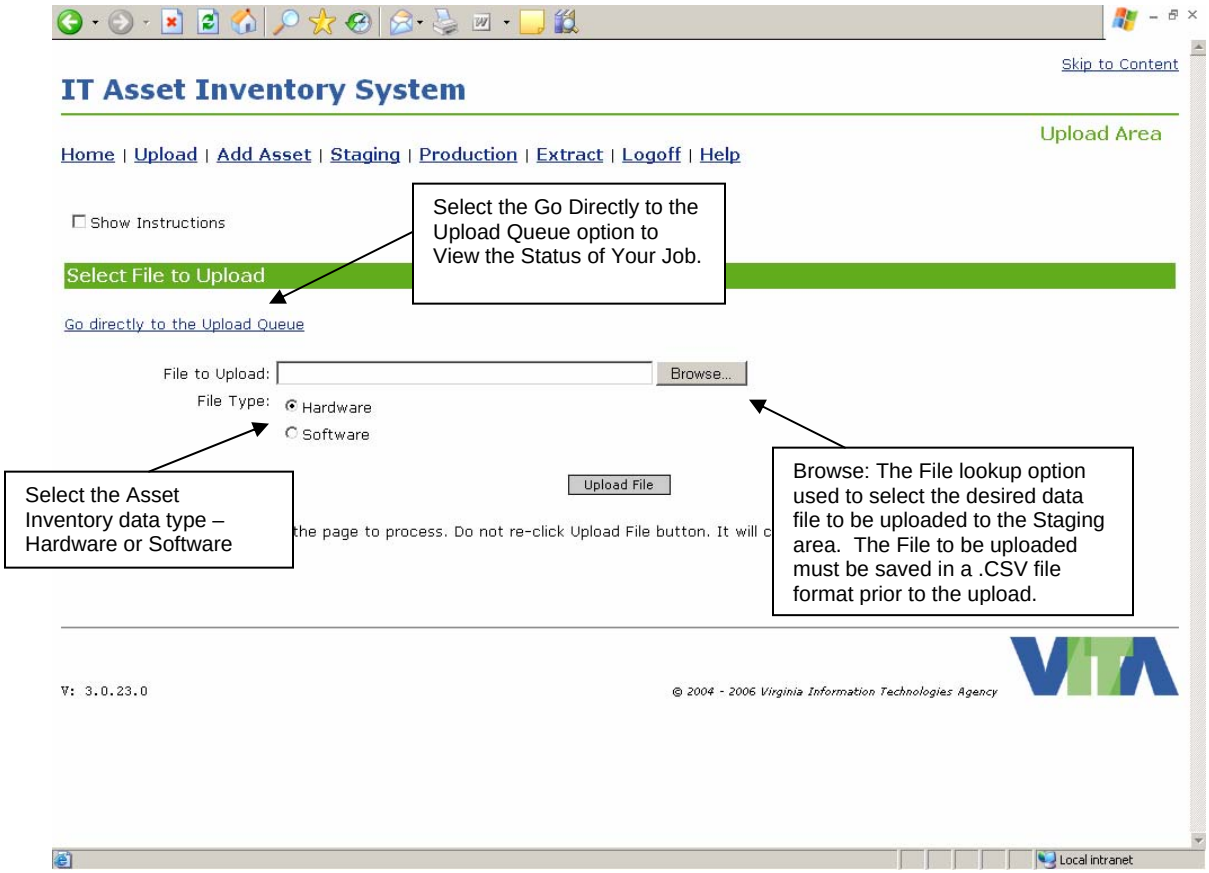
The **SHOW INSTRUCTIONS** option provides detailed steps to upload your Asset Inventory data to the Staging area.



Expanded Instructions

Select the **HIDE INSTRUCTIONS** option to collapse the detailed upload instructions.

FUNCTIONS – UPLOAD AREA



IT Asset Inventory Upload Area

The primary function of this screen is to Browse, Select and Upload Asset Inventory data from a spreadsheet file. Refer to the Comprehensive VITA IT Asset Inventory Workbook for assistance.

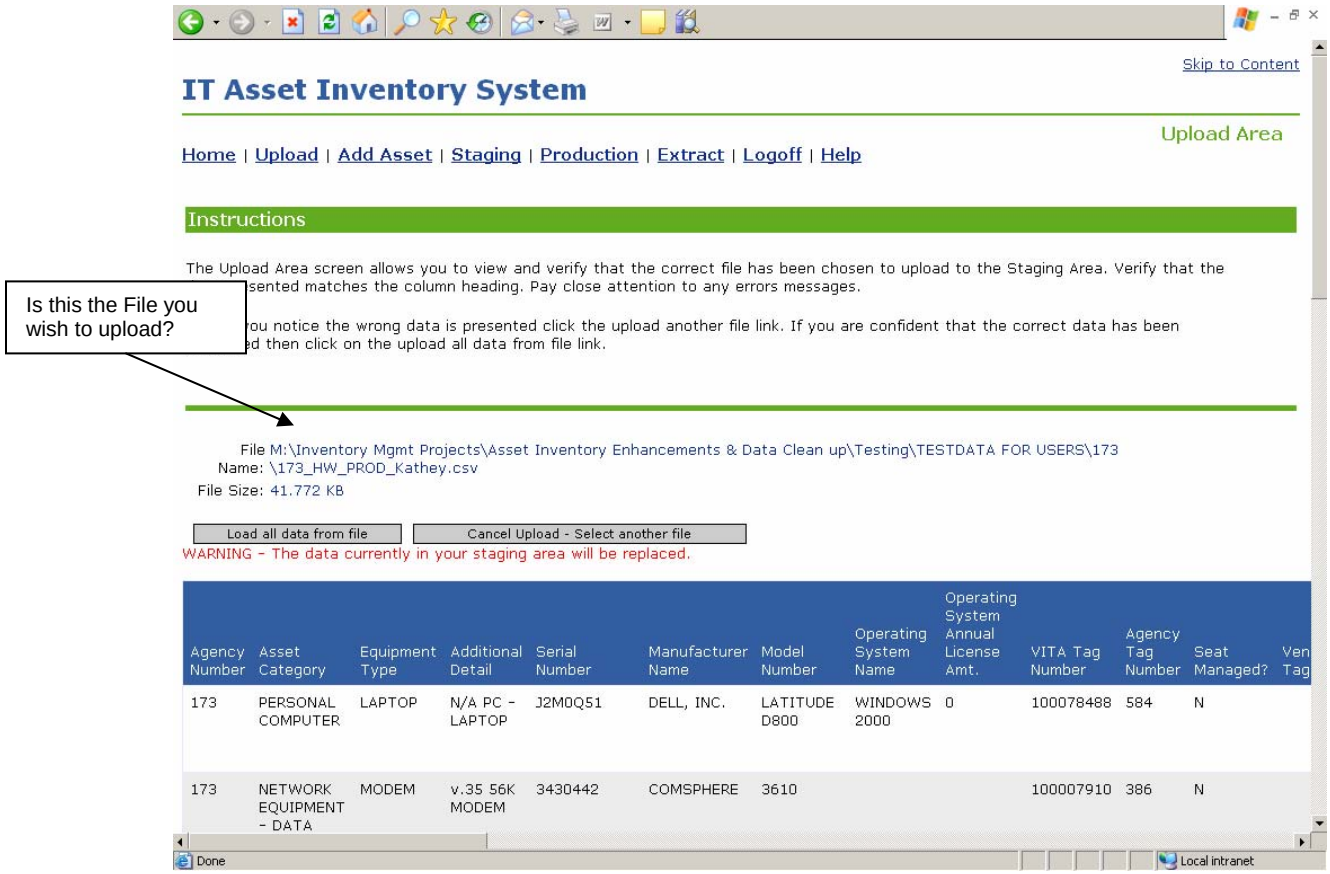
1. **GO DIRECTLY TO THE UPLOAD QUEUE** link allows you to View your Jobs that are running in the Upload Queue.

2. **BROWSE** button allows you to navigate to the location of your spreadsheet(s) and select the file you want to upload. **The spreadsheet selected must a .CSV formatted file** otherwise the system will generate an error message indicating that it cannot upload this file.

3. **FILE TYPE** button allows you to select the type of Assets you are loading – Hardware or Software.

4. **UPLOAD FILE** button allows you to upload the selected file to the VITA IT ASSET INVENTORY SYSTEM **My Staging Area** (a temporary work area used to finalize your asset data prior to loading the data into production).

UPLOAD TO STAGING – INTERMEDIARY SCREEN



Upload Area - Upload to Staging Intermediary

This area displays the data in the file selected for upload into staging. Below are Instructions, Software/Hardware file details, and information about the data file.

1. **Instructions:** The Upload Area screen allows you to view and verify that the correct file has been chosen for upload to My Staging Area. This is the place to verify that the data presented matches the column headings. Pay close attention to any error messages. Should you notice the wrong data is presented, click the **CANCEL UPLOAD-SELECT ANOTHER FILE** button. If you are confident that the correct data has been presented then click the **UPLOAD ALL DATA FROM FILE** button.

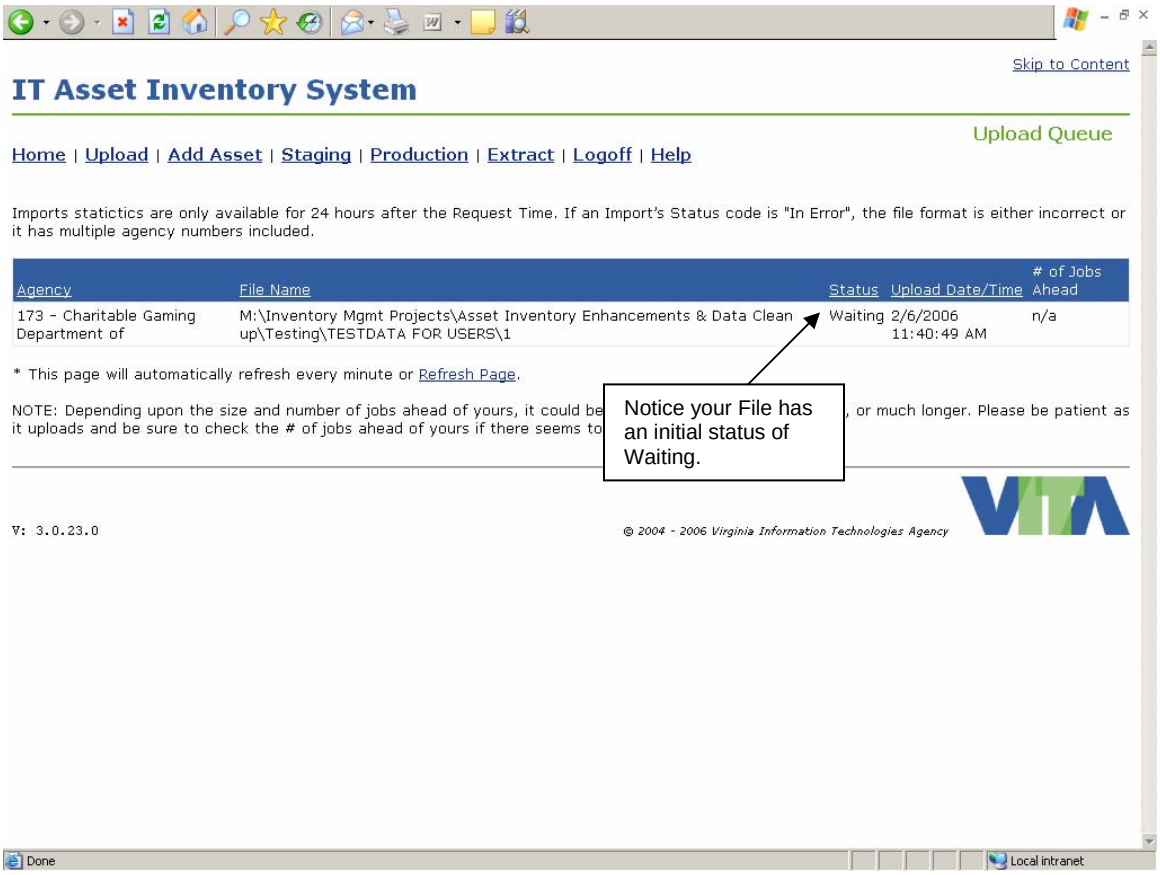
2. **Software/Hardware File Details:** This is a preview of what is being uploaded to staging. To continue the upload with this file select the **LOAD ALL DATA FROM FILE** button. To cancel

this upload, select the **CANCEL UPLOAD–SELECT ANOTHER FILE** button.

3. **Data:** This section allows you to review a sampling of the data to be uploaded by using the scroll bar to see the presented records.

UPLOAD QUEUE

After selecting the **LOAD ALL DATA FROM FILE** button to upload the data into the IT Asset Inventory System, the following Upload Queue Screen is displayed. Here you will see your submitted job, the position (# of Jobs ahead), and status of the job.



Upload Queue

You may click on the **REFRESH PAGE BUTTON** at the bottom of the screen to monitor your job.

When your job has a status of **COMPLETE** you may review the loaded data by selecting the **STAGING** Button at the top of the Page.

STAGING AREA

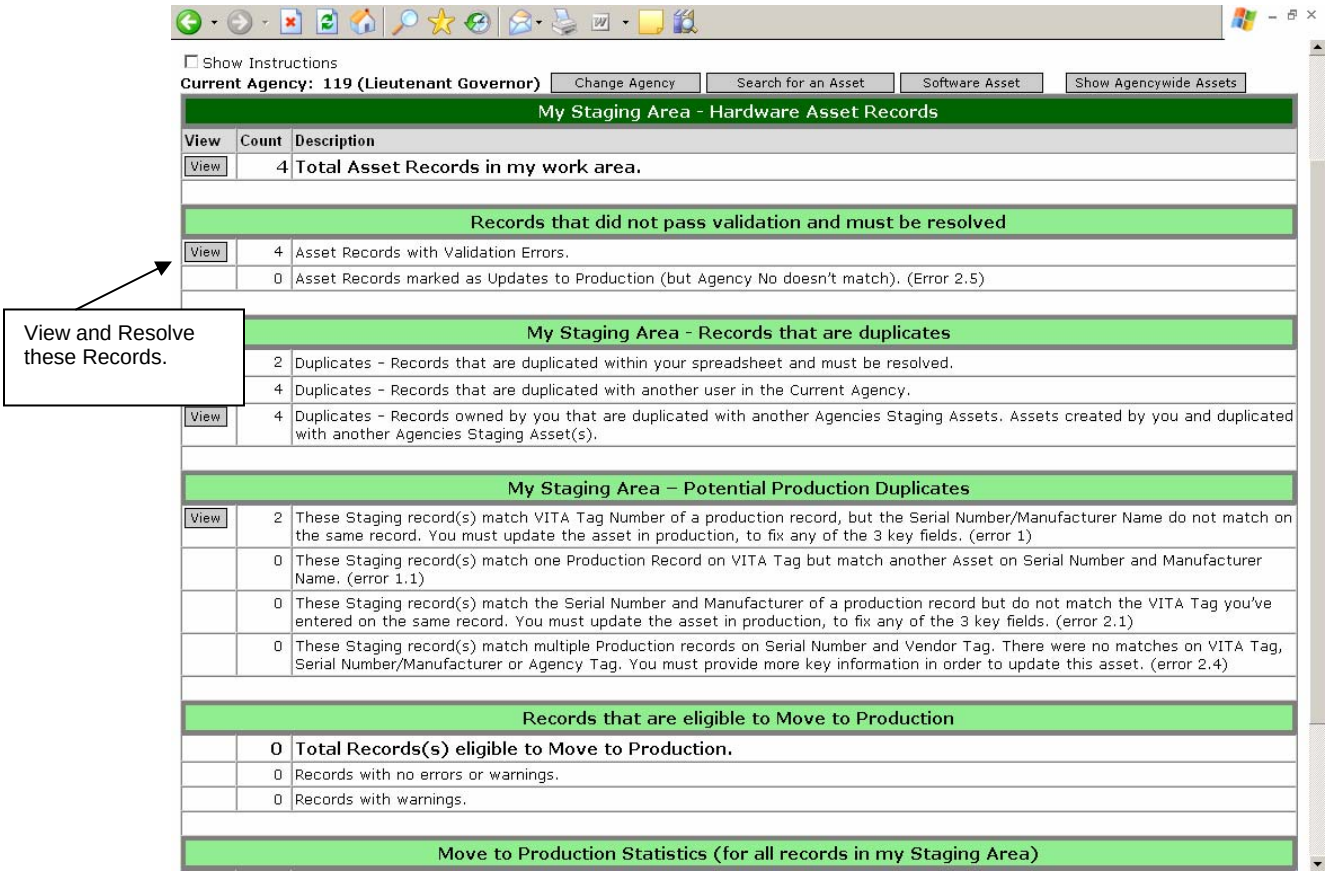
The Staging Area is segmented by My Staging Area and Agency-Wide Staging Area.

My Staging Area

Select the **STAGING** Button at the top of the Page to view the records in the **My Staging Area**.

The My Staging Area Summary screen displays:

- The Total Number of Assets Loaded into My Staging Area
- Records that are Duplicates in your Staging Area
- Records that may be Duplicates in Production
- Records that are Eligible to Move to Production
- The Move to Production Statistics for Your Records in Your Staging Area



My Staging Area Summary

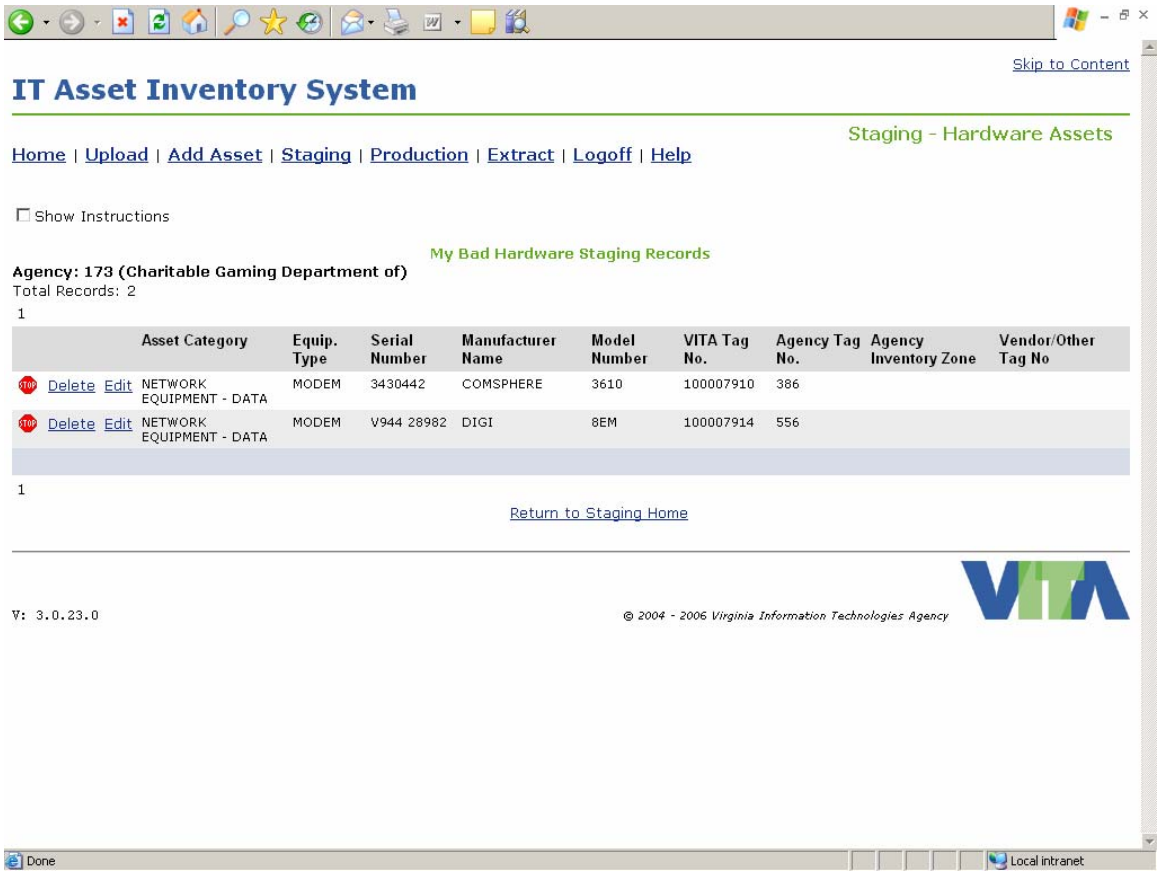
Each time you upload an asset spreadsheet, the data in the **My Staging Area** is replaced with the data you uploaded.

Any records that did not pass validation, should be viewed and resolved in order to move those records into Production.

Select the **View** button in the **RECORDS THAT DID NOT PASS VALIDATION AND MUST BE RESOLVED** section to display the Bad Staging Records.

STAGING – VIEW BAD STAGING RECORDS

In the example below, the four (4) hardware assets that did not pass the validation tests are displayed.



My Staging – Hardware Assets

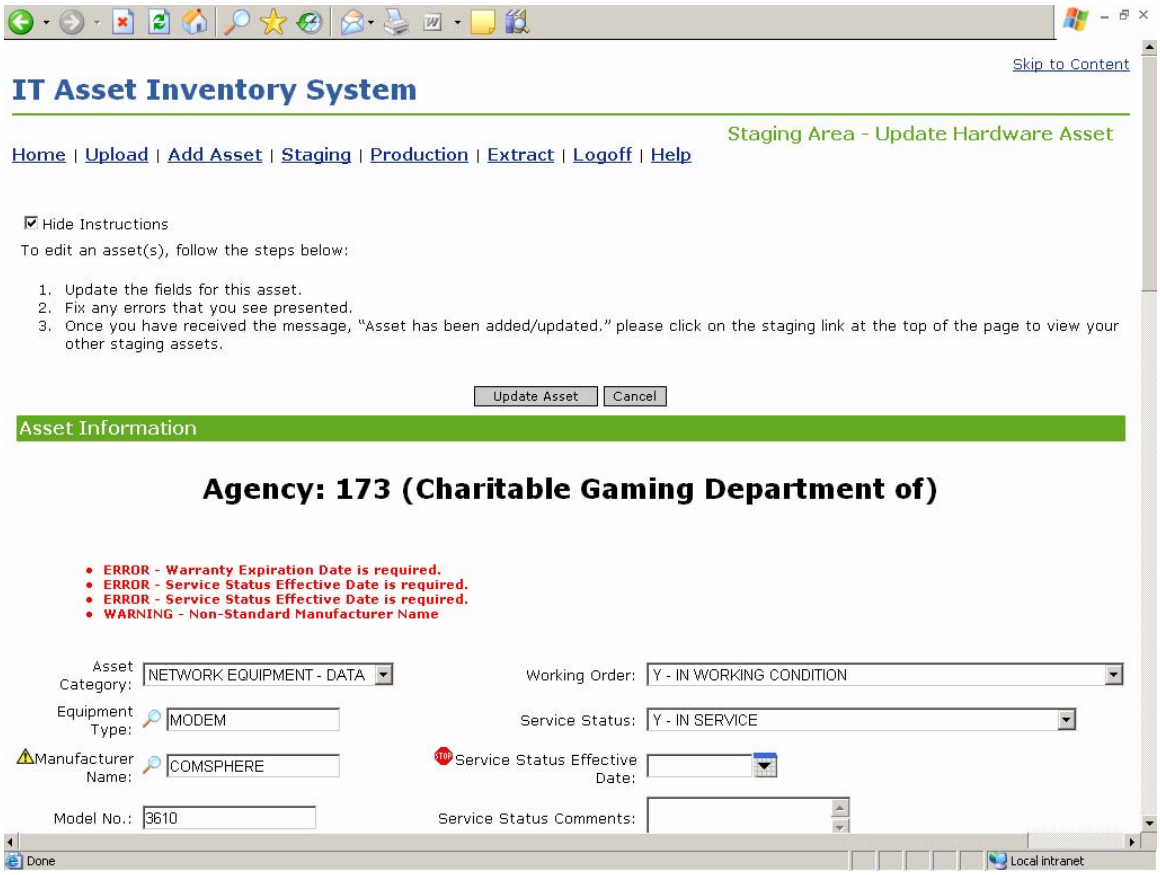
A **YELLOW YIELD SIGN** with a black exclamation mark indicates a warning. The field will load but you may want to address the issue prior to loading.

A **RED STOP SIGN** indicates that there is an error with this field and the record will not pass validation unless corrected.

Moving the mouse over the RED STOP Sign or the YELLOW YIELD Sign for a specific row, displays a pop-up with information explaining why a record did not pass validation. The choices are to **DELETE** or **EDIT** the record.

STAGING AREA - UPDATE ASSET

In this example, **EDIT** was selected. The **EDIT** selection displays the Update Instructions, the Errors and the asset record fields.



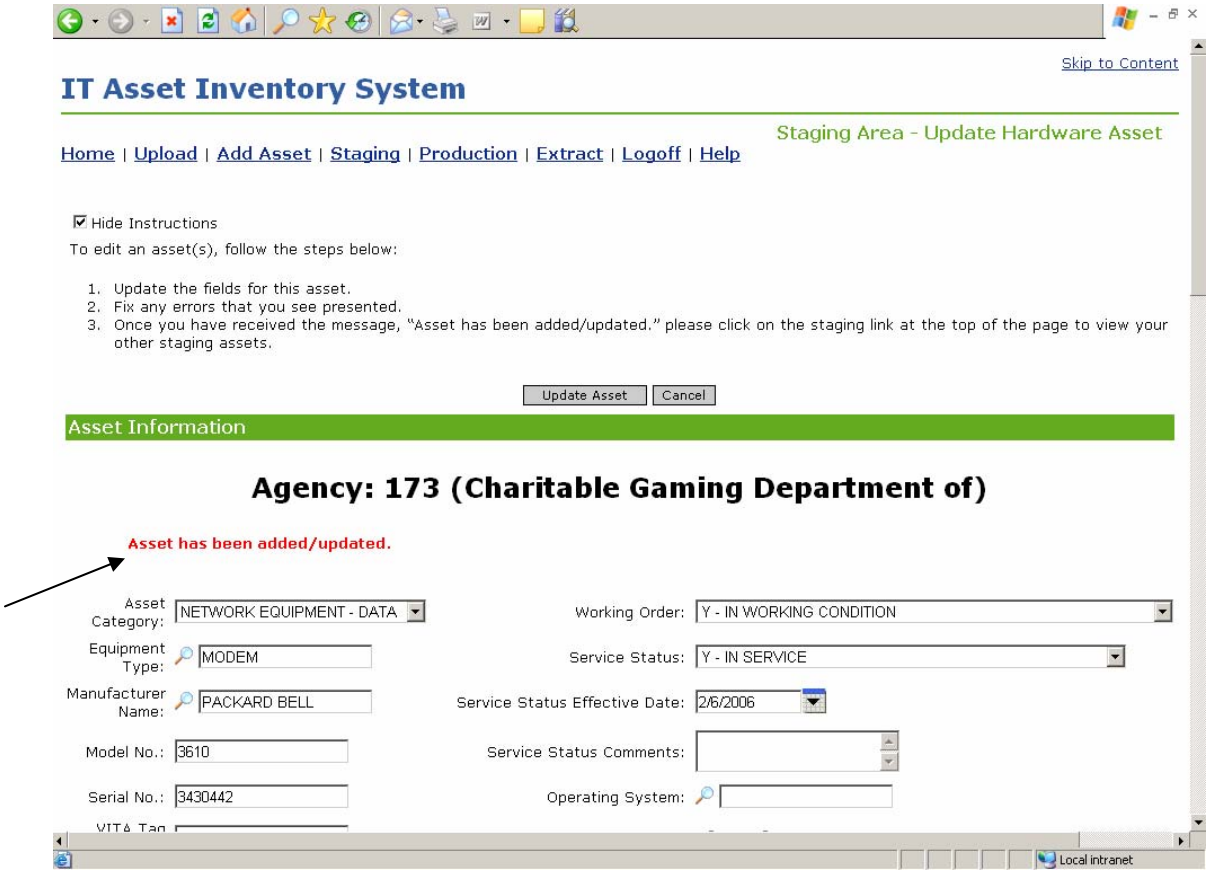
Staging Area – Update Hardware Asset

The error messages will direct you to the fields that must be corrected before the record can be moved to the "Production Area". The warning messages will also be displayed.

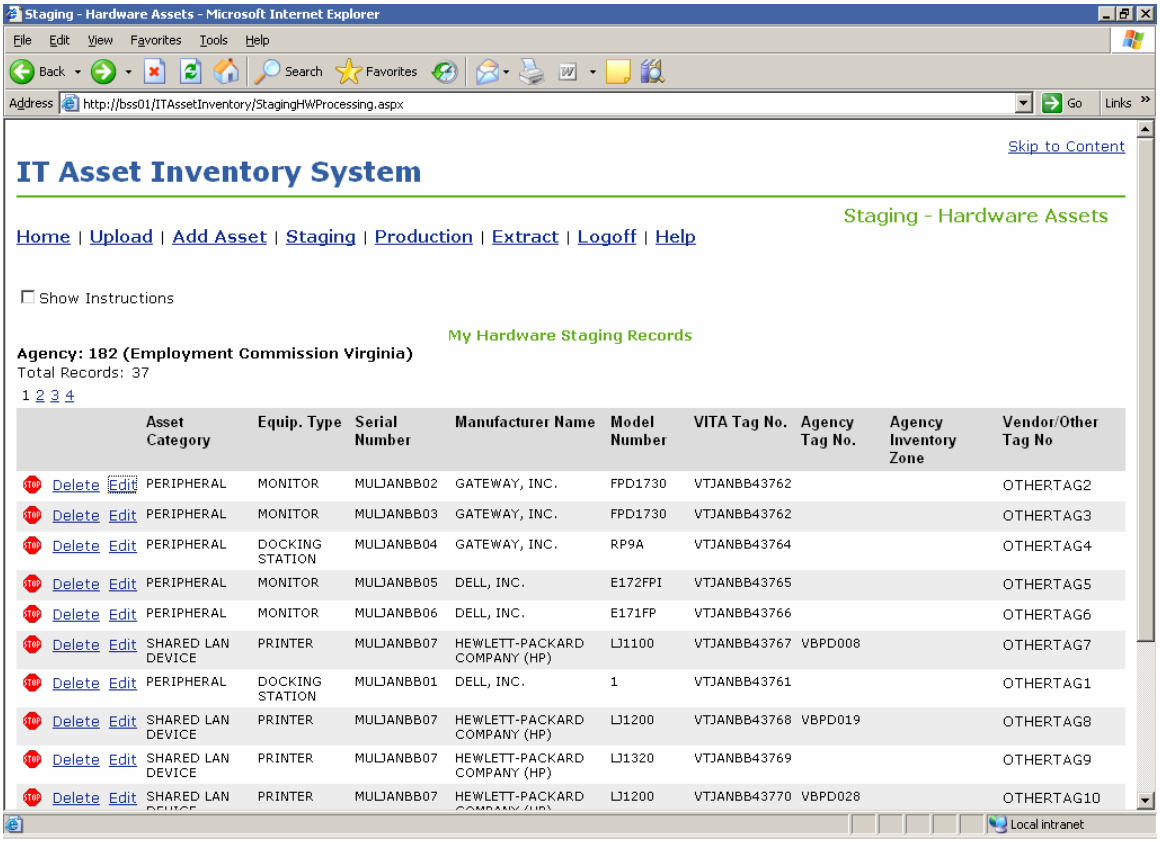
Once the errors have been corrected or you have completed editing this asset, select one of the following options:

- **UPDATE ASSET:** Will save this asset record to Staging and re-validate asset.
- **CANCEL:** Will return to the Staging area and disregard any changes made.

When all errors associated with the record have been corrected and Update Asset has been selected, a message will appear indicating the **ASSET HAS BEEN ADDED OR UPDATED**.



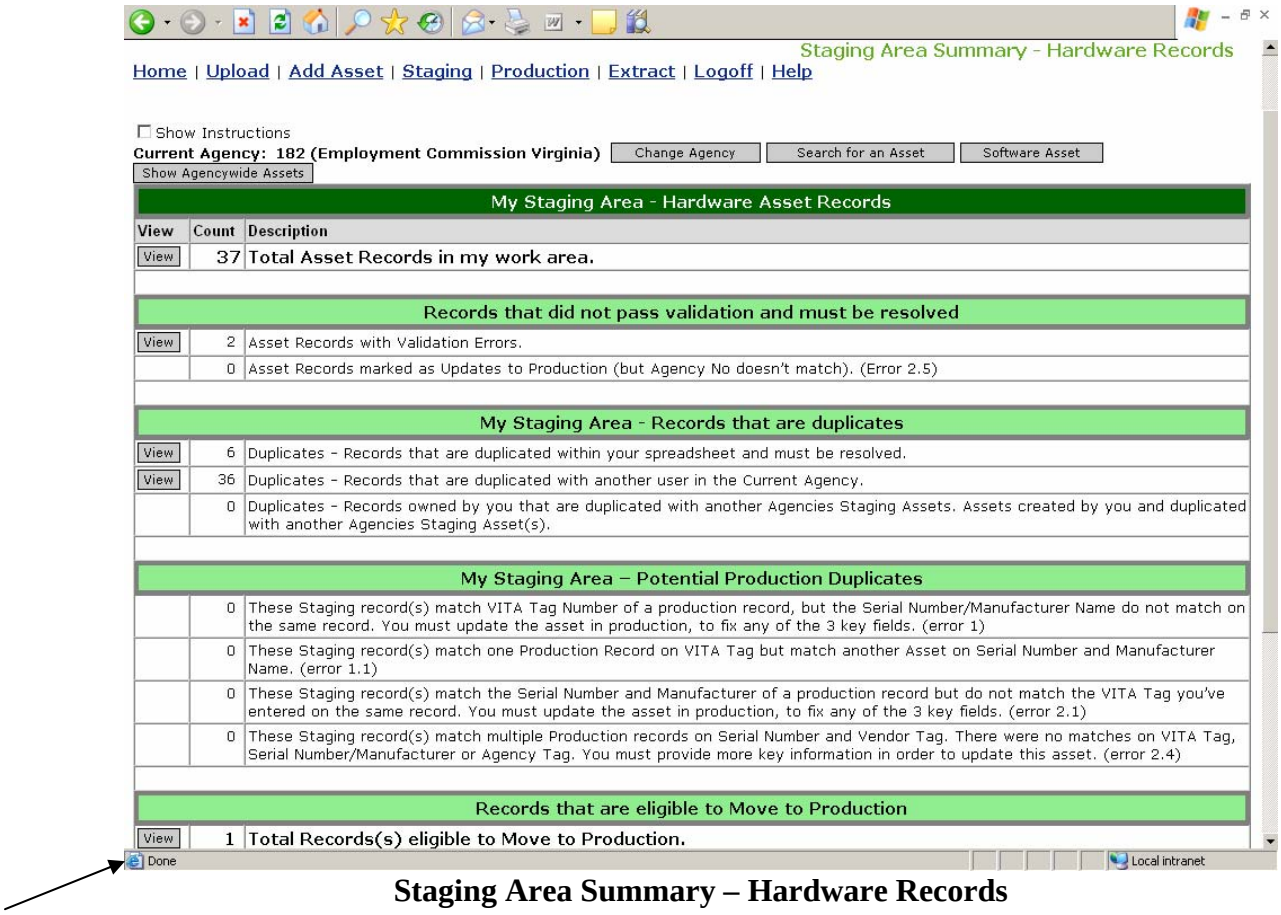
Staging Area – Update Hardware Asset



My Staging – Hardware Assets

MY STAGING AREA – MOVE TO PRODUCTION

Once you have corrected all of the Assets that you wish to "**move to Production**", click on the **STAGING** button to view the records in your staging area waiting to be moved.

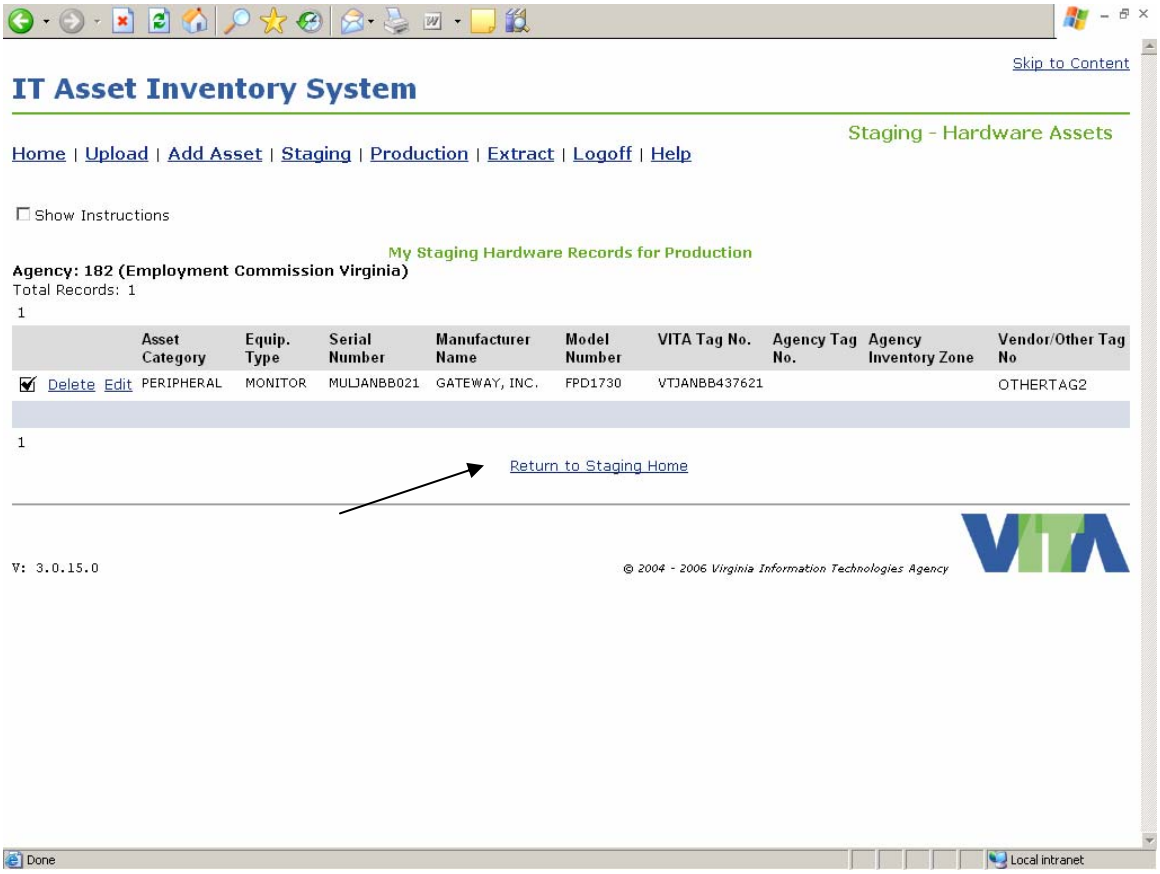


Staging Area Summary – Hardware Records

Click the **VIEW** button in the **RECORDS THAT ARE ELIGIBLE TO MOVE TO PRODUCTION** section to display the records that are ready to be moved to the "**Production Area**".

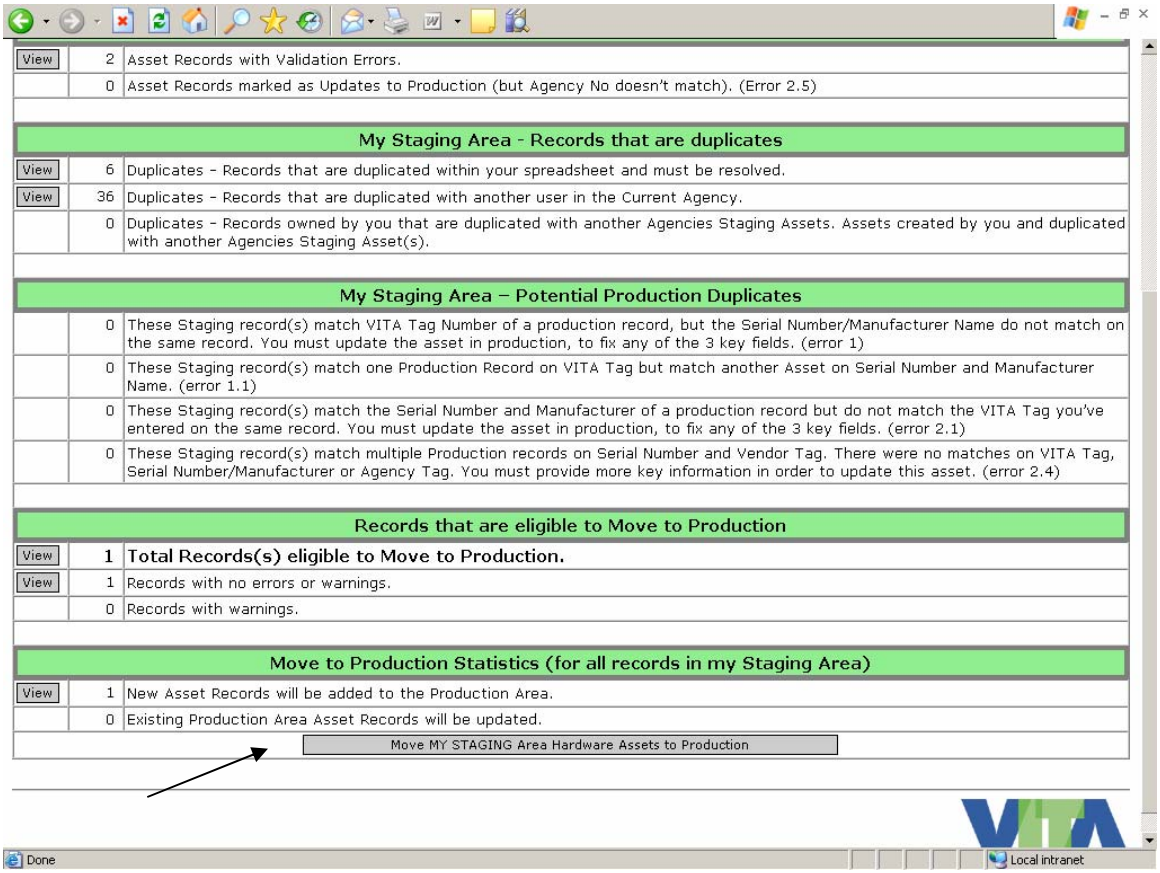
The screen below shows the record eligible to be moved to Production. You have the option to **EDIT** the record(s) or **DELETE** the record(s) from your "**My Staging Area"**.

Select the **RETURN TO STAGING HOME** to return to the "**My Staging Area**" and prepare to move the record(s) to Production.



Staging – Hardware Assets

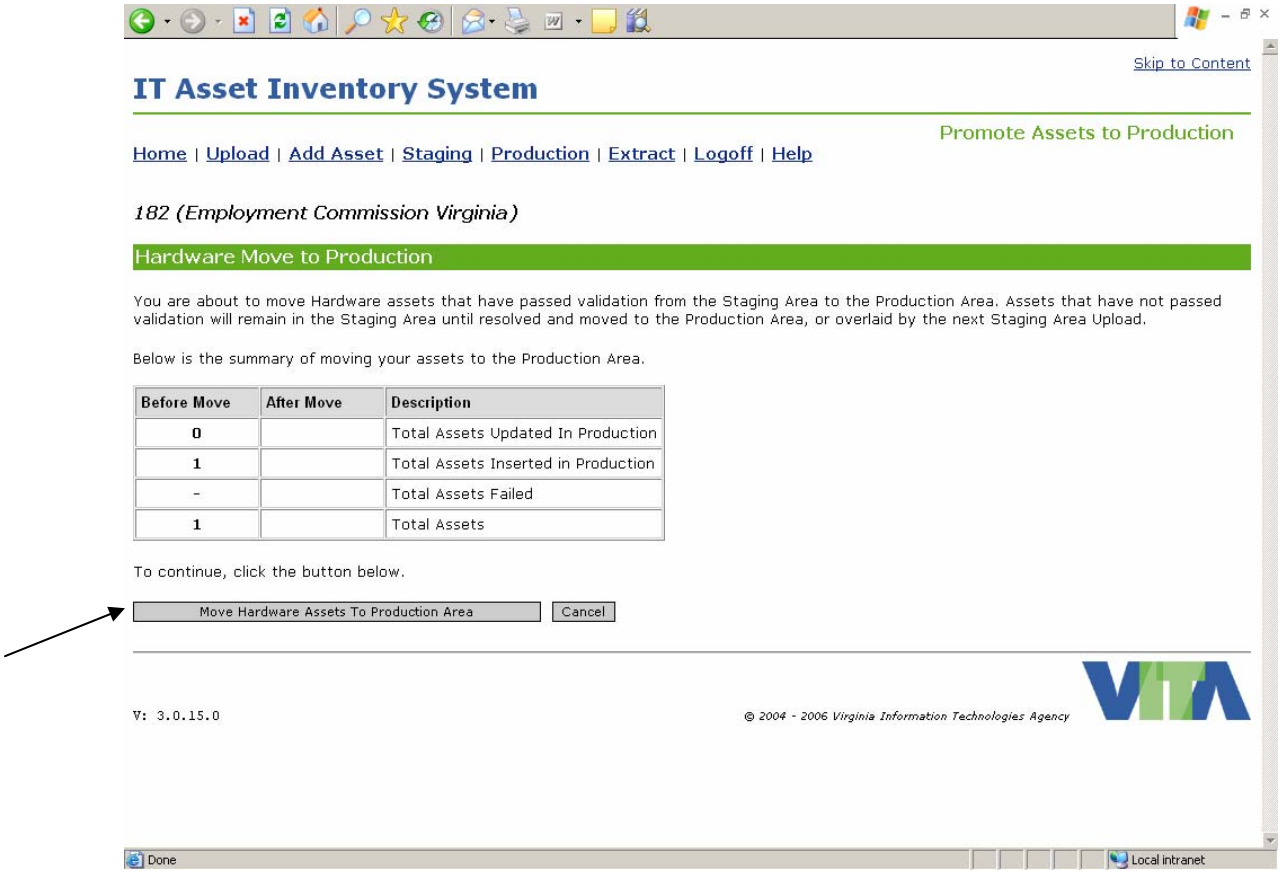
Once you are satisfied that all editing is completed and are ready to move the valid asset data to production, then select the **MOVE MY STAGING AREA HARDWARE/SOFTWARE ASSETS TO PRODUCTION** button at the bottom of the page.



Staging Area Summary – Hardware Records

When the **Move MY STAGING Area Hardware/Software Assets to Production** button is selected, the screen below is displayed to summarize the number of assets that will be moved to Production.

Click the **MOVE HARDWARE ASSETS TO PRODUCTION AREA** button to continue the move process, or click the **CANCEL** button to discontinue the move.

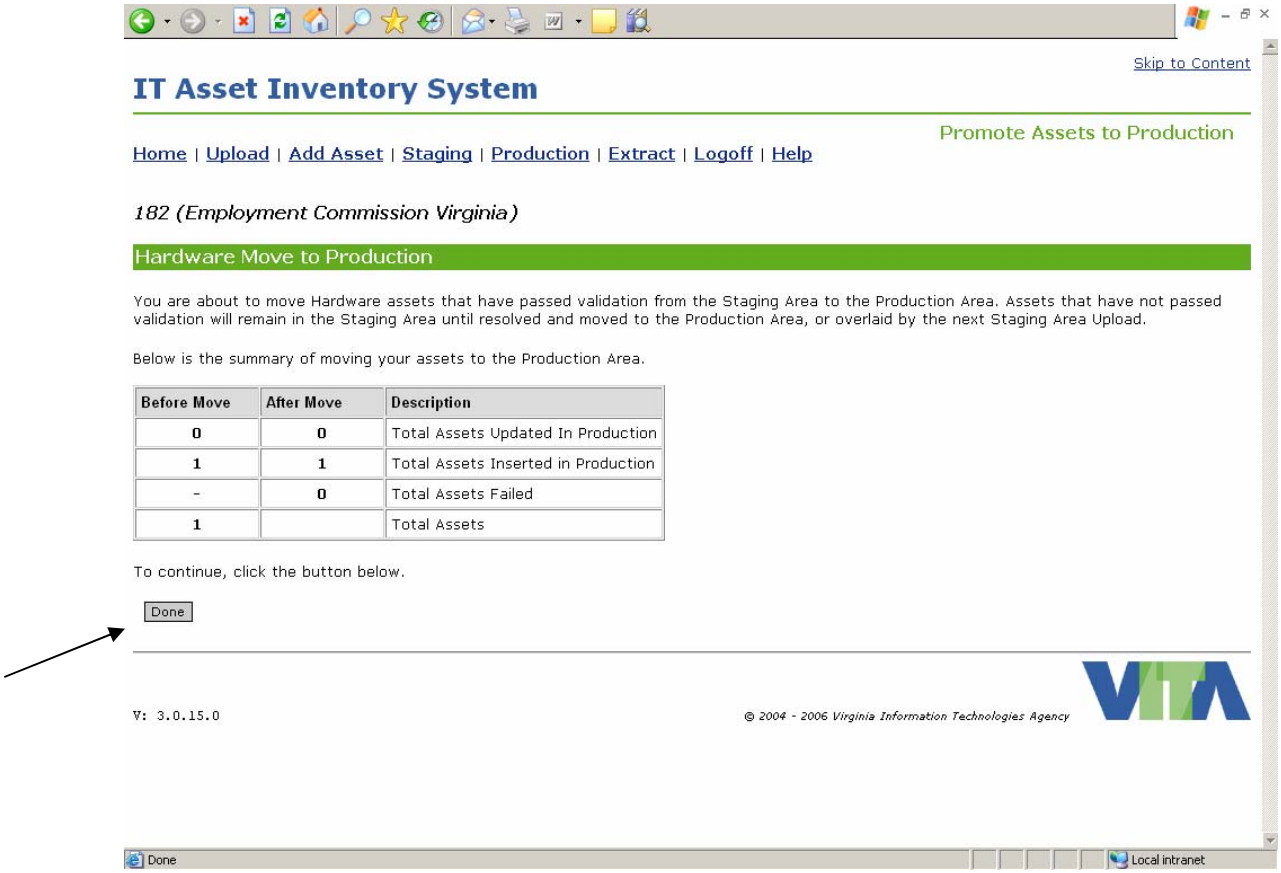


Promote Assets to Production

Once the assets have been moved to production, the Promote Assets to Production page is displayed showing:

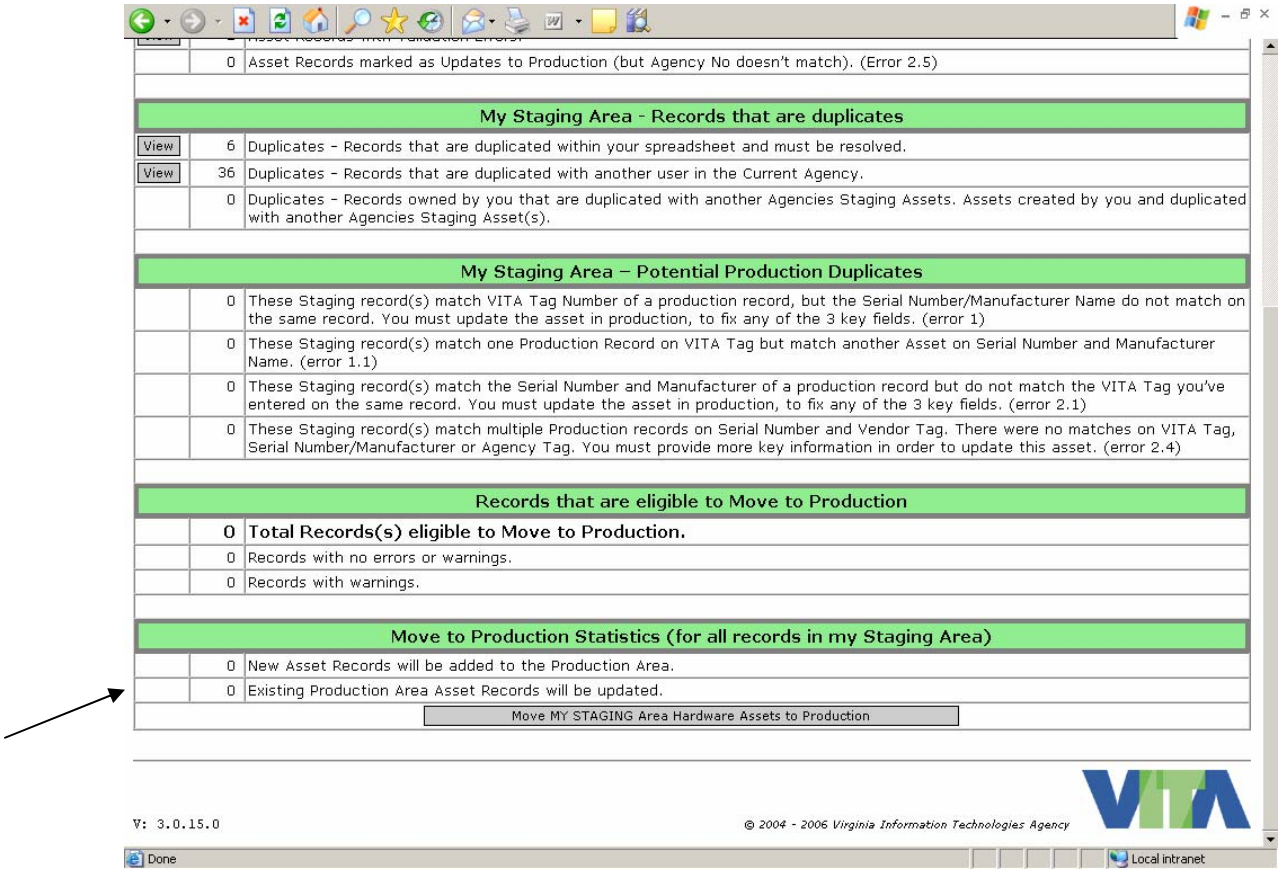
- The Total Assets Updated in Production
- The Total Assets Inserted in Production
- The Total Assets Fail during the move
- Total Assets

Click the **DONE** button to return to Staging Area Summary Screen.



Promote Assets to Production

Notice the number of Records in the Move to Production Statistics area after the successful move.



	0	Asset Records marked as Updates to Production (but Agency No doesn't match). (Error 2.5)
My Staging Area - Records that are duplicates		
View	6	Duplicates - Records that are duplicated within your spreadsheet and must be resolved.
View	36	Duplicates - Records that are duplicated with another user in the Current Agency.
	0	Duplicates - Records owned by you that are duplicated with another Agencies Staging Assets. Assets created by you and duplicated with another Agencies Staging Asset(s).
My Staging Area – Potential Production Duplicates		
	0	These Staging record(s) match VITA Tag Number of a production record, but the Serial Number/Manufacturer Name do not match on the same record. You must update the asset in production, to fix any of the 3 key fields. (error 1)
	0	These Staging record(s) match one Production Record on VITA Tag but match another Asset on Serial Number and Manufacturer Name. (error 1.1)
	0	These Staging record(s) match the Serial Number and Manufacturer of a production record but do not match the VITA Tag you've entered on the same record. You must update the asset in production, to fix any of the 3 key fields. (error 2.1)
	0	These Staging record(s) match multiple Production records on Serial Number and Vendor Tag. There were no matches on VITA Tag, Serial Number/Manufacturer or Agency Tag. You must provide more key information in order to update this asset. (error 2.4)
Records that are eligible to Move to Production		
	0	**Total Records(s) eligible to Move to Production.**
	0	Records with no errors or warnings.
	0	Records with warnings.
Move to Production Statistics (for all records in my Staging Area)		
	0	New Asset Records will be added to the Production Area.
	0	Existing Production Area Asset Records will be updated.

Move MY STAGING Area Hardware Assets to Production

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Done

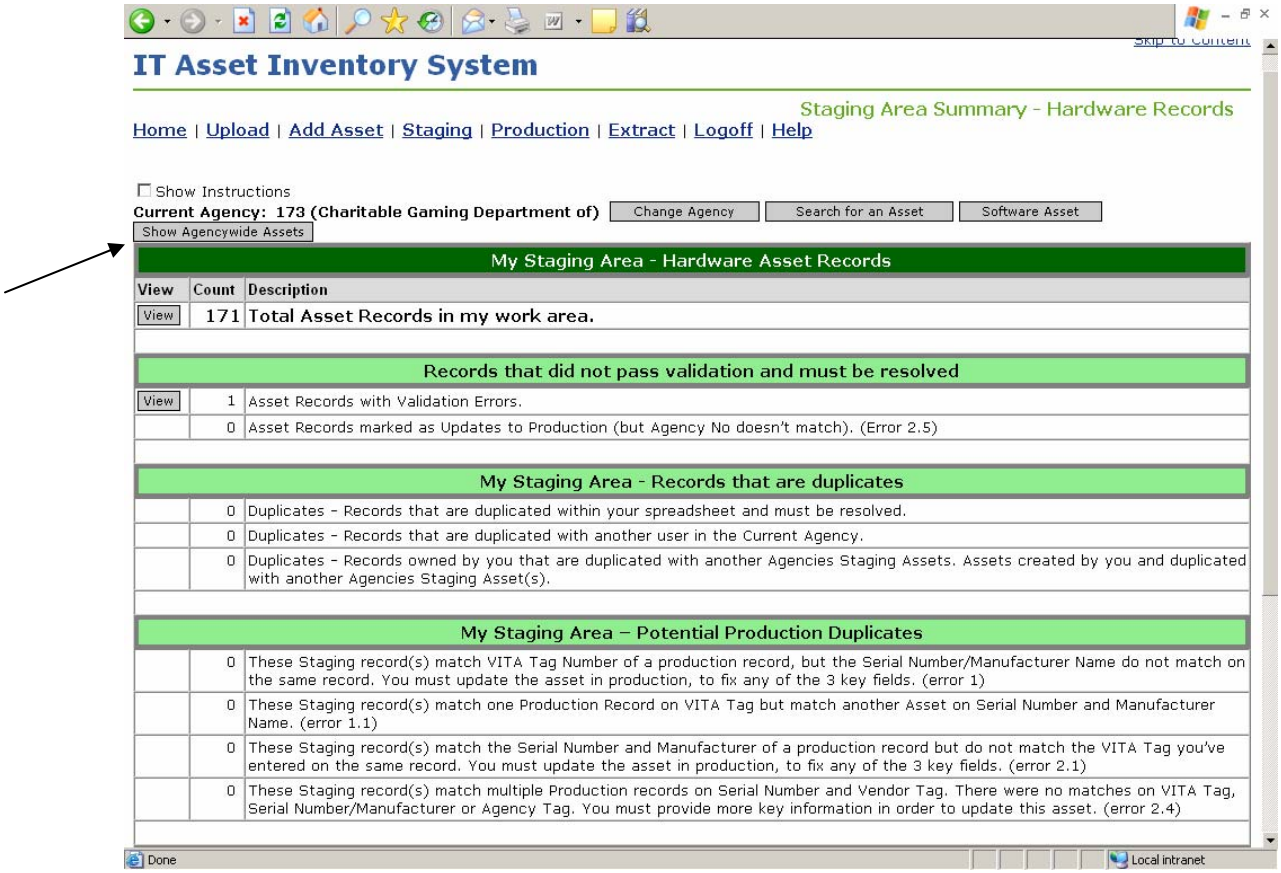
Local intranet

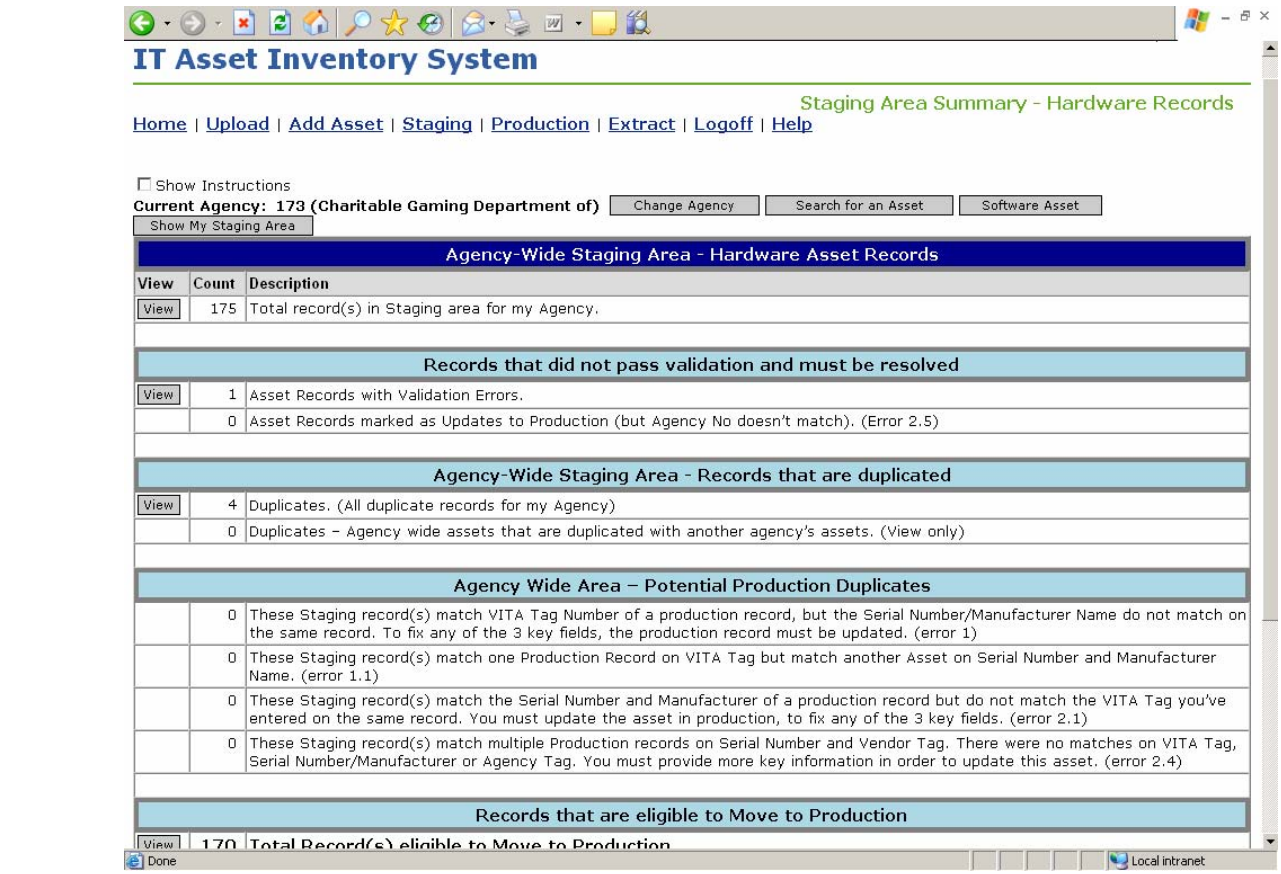
Staging Area Summary – Hardware Records

AGENCY-WIDE STAGING AREA

The Agency-Wide Staging Area displays records uploaded by another user within the same agency. It acts the same as My Staging Area except that the records can only be removed or adjusted online. Uploads will not affect data uploaded by others.

Select the **STAGING** Button at the top of the Page. Select the Show Agencywide Assets button to view the records in the Agency-Wide Staging area. Follow the procedures shown in the My Staging Area to manage the records in the Agency-Wide Staging Area





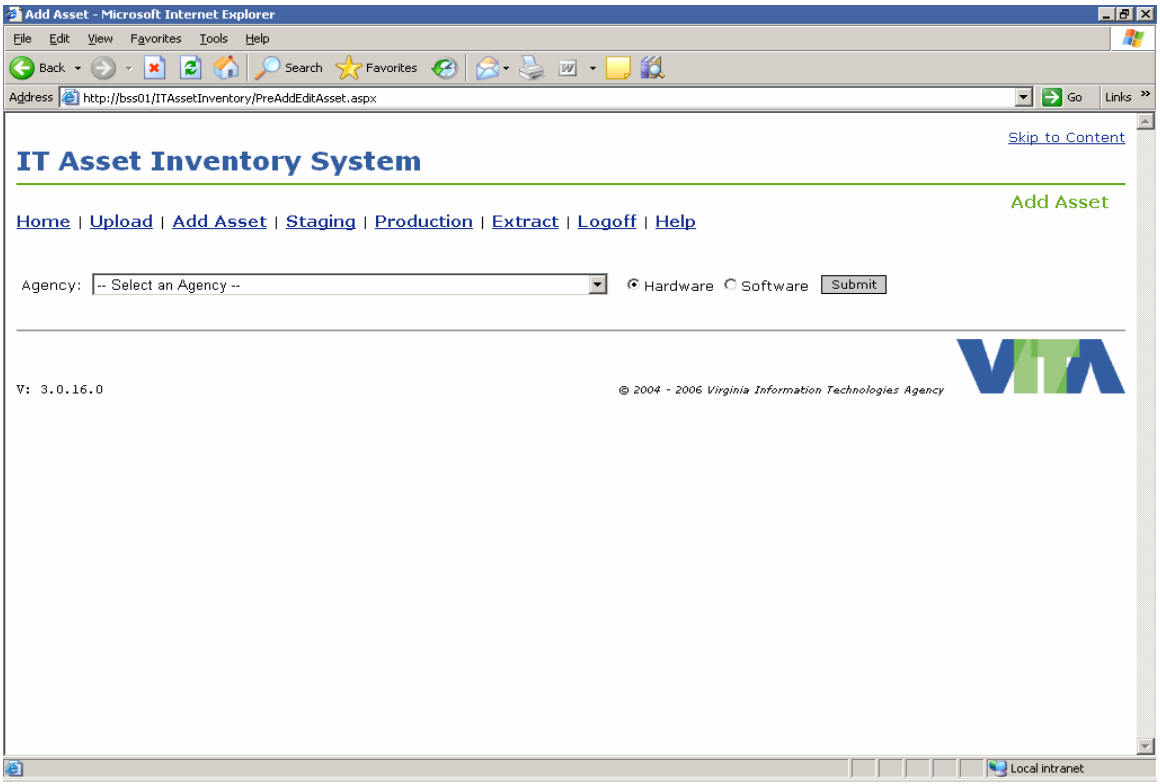
The Agency-Wide Staging Area Summary screen displays:

- The Total Number of Assets contained in the Staging Area
- Total Records that are Duplicates in the Staging Area
- Records that may be Duplicates in Production
- Records that are Eligible to Move to Production
- The Move to Production Statistics for All Records in the Staging Area

ADD NEW ASSET

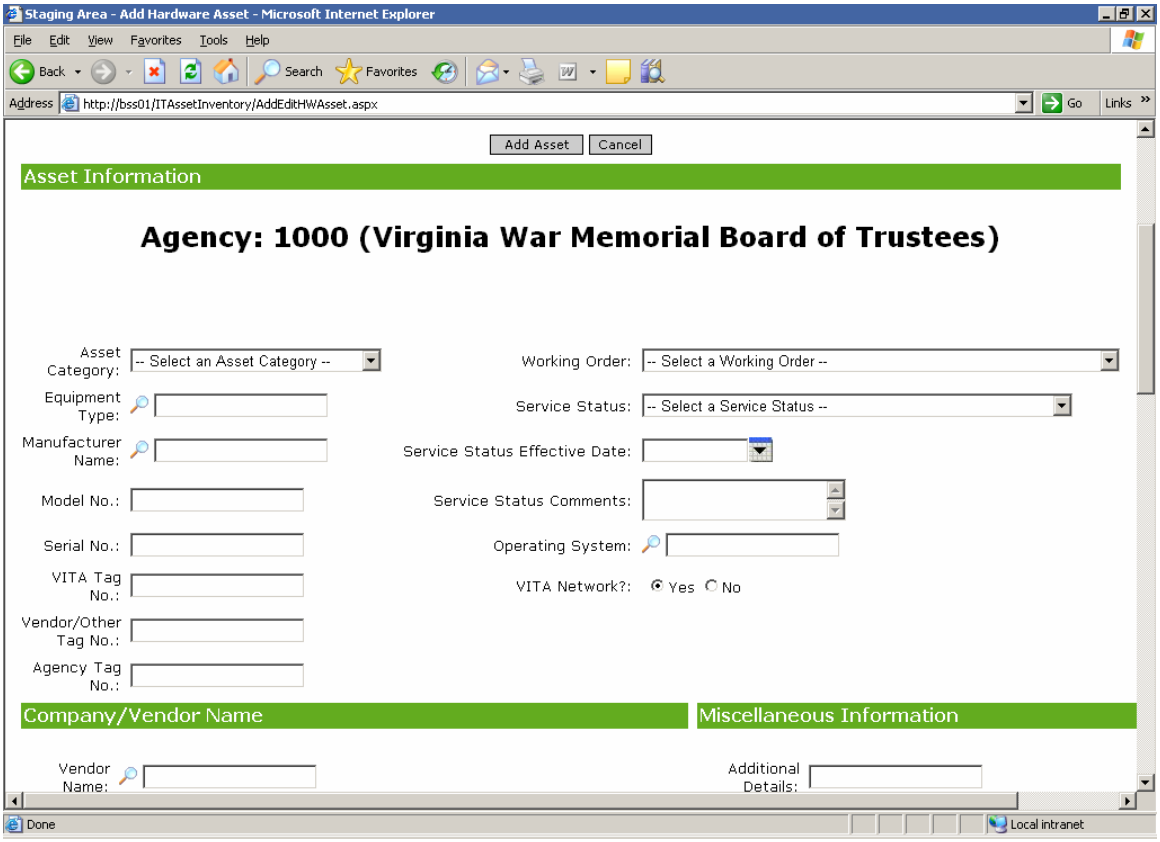
Individual IT Assets can be added to the Inventory System by selecting the **ADD ASSET** button at the top of the screen.

The asset will be added to the Staging Area and will have to be moved to Production.



Add Asset

To add a new Asset, select the **AGENCY** that you would like the Asset added to, select **HARDWARE or SOFTWARE**, and click the **SUBMIT** button to add the information.

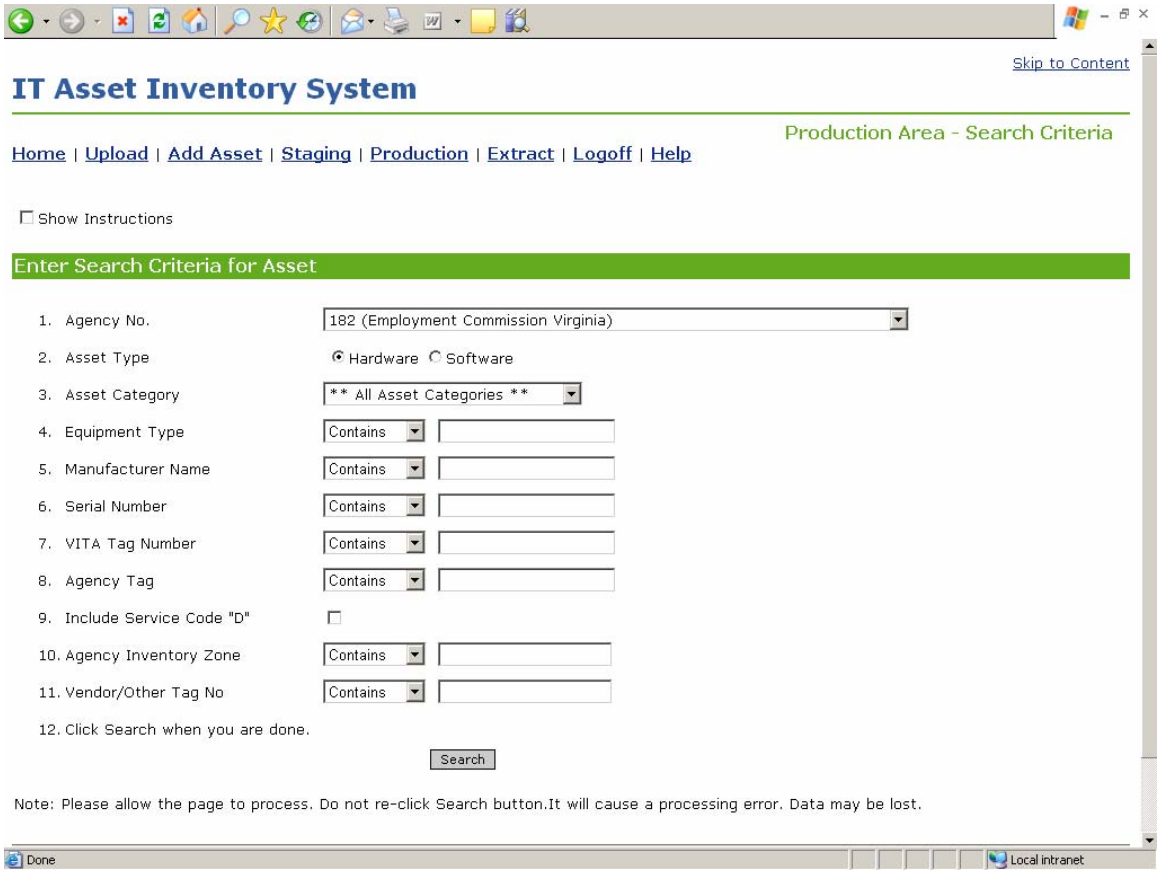


Staging Area - Add Hardware Asset

After entering the data for the new Asset, the user can either select:

- **ADD ASSET** – saves the data as a new asset record in the Staging Area.
- **CANCEL** – cancel all data entry for this record and return to the Add Asset screen.

PRODUCTION AREA



Production Area – Search Criteria

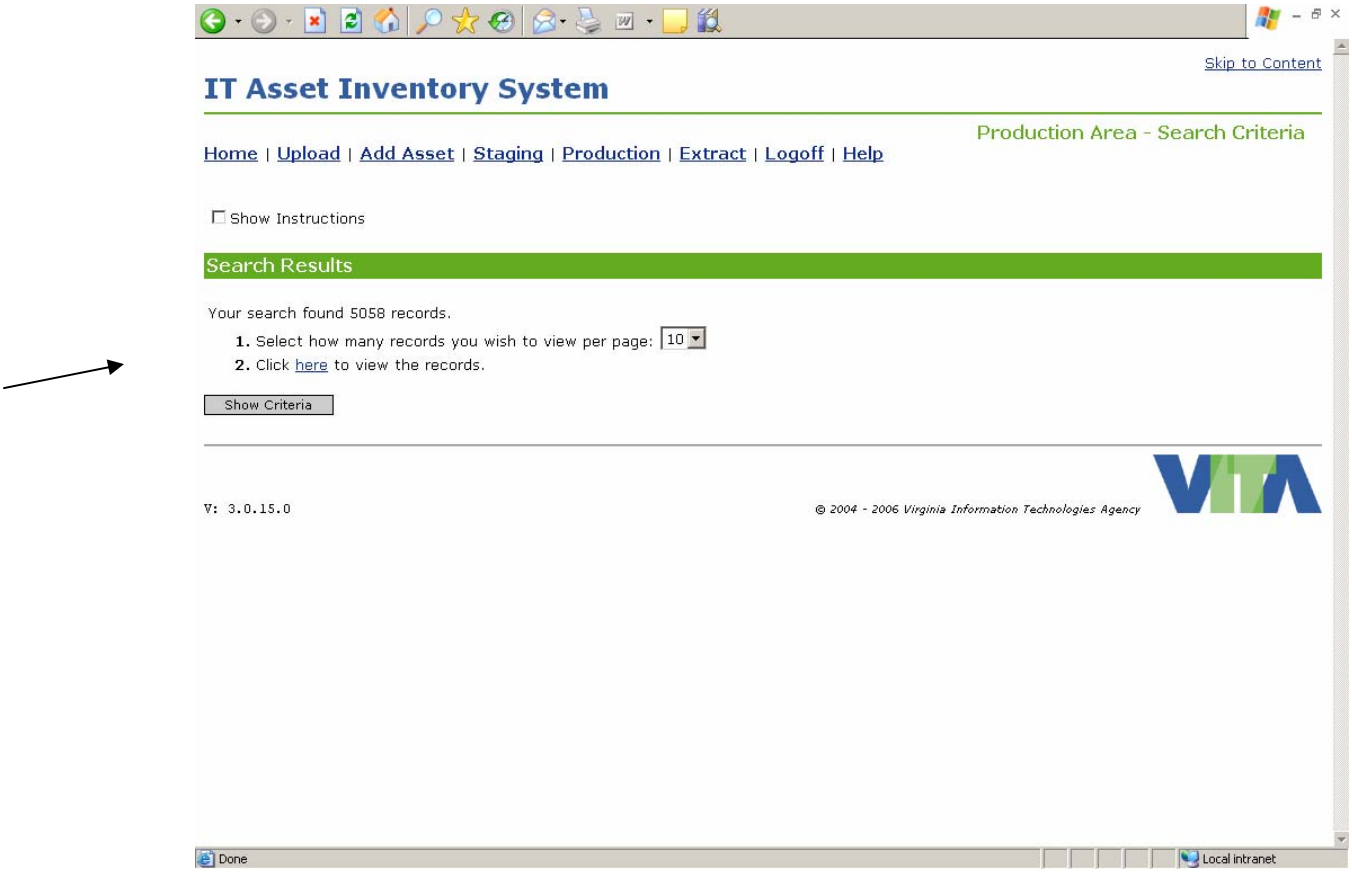
Click on the **PRODUCTION** link at the top of the page to review your production data.

Fill in the categories you wish to search on and click on the **SEARCH** button.

SEARCH RESULTS – PRODUCTION AREA

The **Search Results** section of the **Production Area – Search Criteria** page displays:

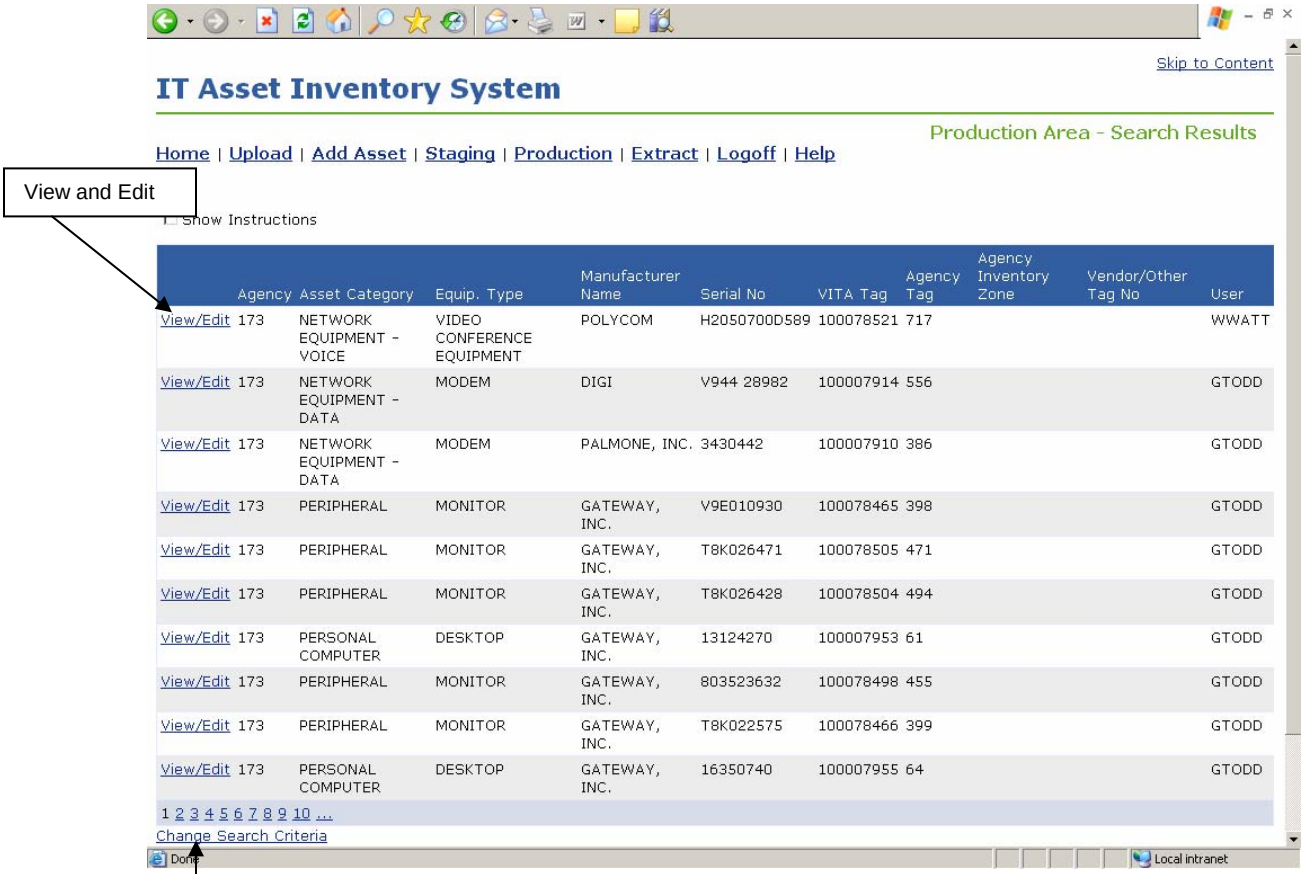
- The number of records found
- The number of records you may display per page.
- Click **HERE** to view the records.



Production Area – Search Criteria

The **SHOW CRITERIA** button allows you to display and modify your Production record Search options to search for other records.

The Click **HERE** button will display records similar to ones shown below.



	Agency	Asset Category	Equip. Type	Manufacturer Name	Serial No	VITA Tag	Agency Tag	Agency Inventory Zone	Vendor/Other Tag No	User
View/Edit	173	NETWORK EQUIPMENT - VOICE	VIDEO CONFERENCE EQUIPMENT	POLYCOM	H2050700D589	100078521	717			WWATT
View/Edit	173	NETWORK EQUIPMENT - DATA	MODEM	DIGI	V944 28982	100007914	556			GTODD
View/Edit	173	NETWORK EQUIPMENT - DATA	MODEM	PALMONE, INC.	3430442	100007910	386			GTODD
View/Edit	173	PERIPHERAL	MONITOR	GATEWAY, INC.	V9E010930	100078465	398			GTODD
View/Edit	173	PERIPHERAL	MONITOR	GATEWAY, INC.	T8K026471	100078505	471			GTODD
View/Edit	173	PERIPHERAL	MONITOR	GATEWAY, INC.	T8K026428	100078504	494			GTODD
View/Edit	173	PERSONAL COMPUTER	DESKTOP	GATEWAY, INC.	13124270	100007953	61			GTODD
View/Edit	173	PERIPHERAL	MONITOR	GATEWAY, INC.	803523632	100078498	455			GTODD
View/Edit	173	PERIPHERAL	MONITOR	GATEWAY, INC.	T8K022575	100078466	399			GTODD
View/Edit	173	PERSONAL COMPUTER	DESKTOP	GATEWAY, INC.	16350740	100007955	64			GTODD

1 2 3 4 5 6 7 8 9 10 ...

Production Area – Search Results

UPDATING IN THE PRODUCTION AREA

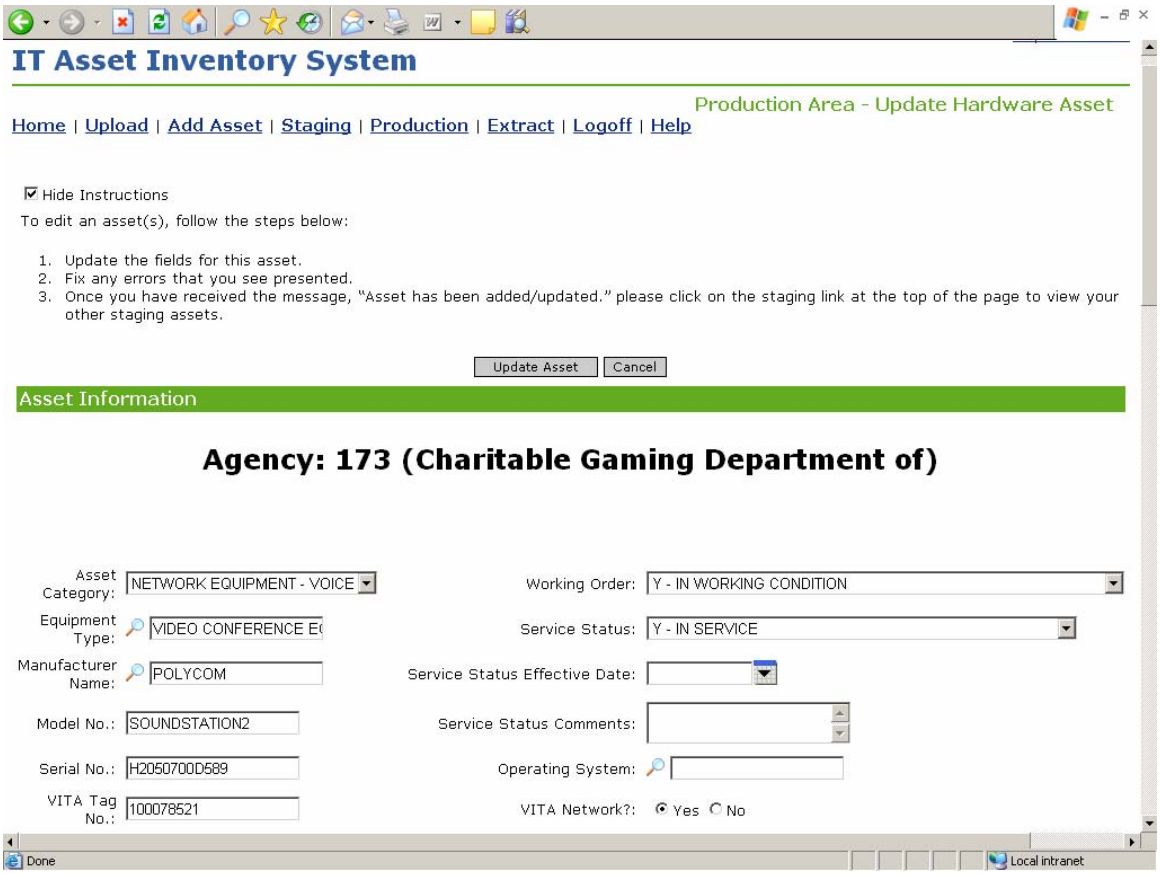
The **VIEW/EDIT** link on the Production Area – Search Results screen above allows you to View or Edit a particular record.

The **CHANGE SEARCH CRITERIA** button allows you to modify your Production record Search options to search for other records.

When the **VIEW/EDIT** link is selected for a particular record, all associated fields are displayed and can be updated.

After modifying the desired fields, click the **UPDATE ASSET** button to save your changes.

If there are no changes to be made to the Asset Record, click the **CANCEL** button to return to the Production Area–Search Results screen.



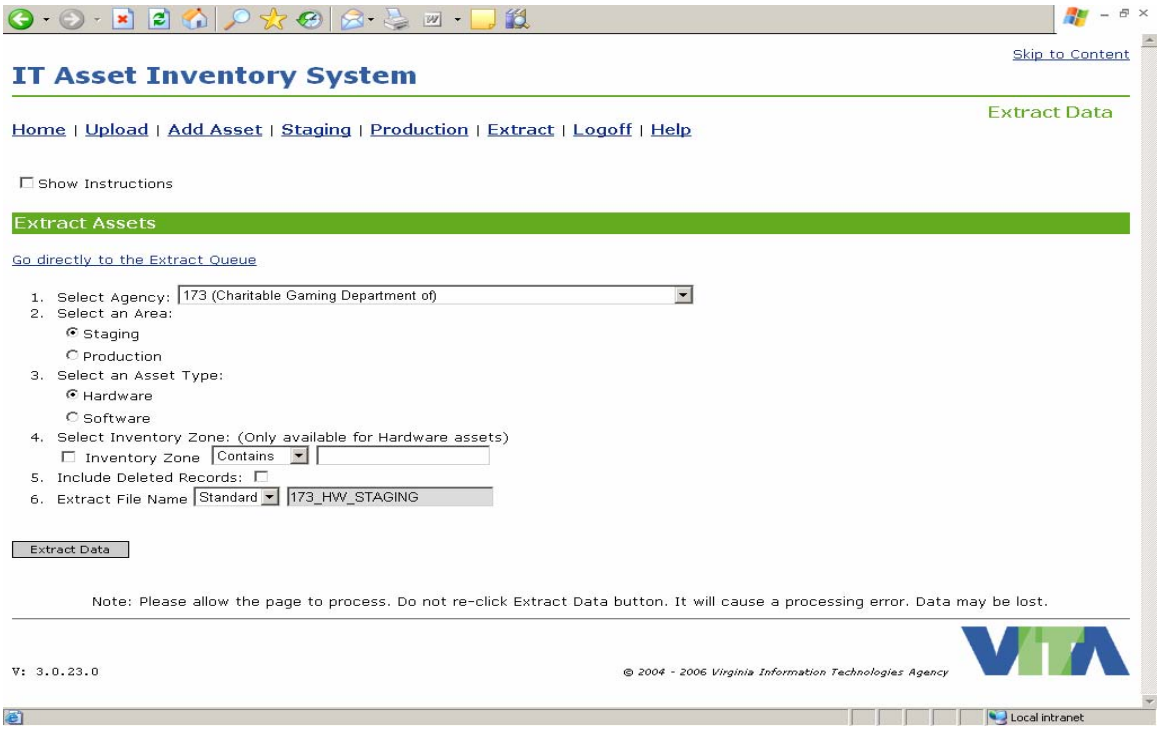
Production Area – Update Hardware Asset

EXTRACT DATA

The Extract Area allows users to extract (download) hardware and software asset data from both the staging and production areas. The Extract from Staging acts as an Exception Report by displaying any error in the far right columns of the report

Follow the steps below to extract your agency data.

- Select the **AGENCY** from which to extract the data.
- Select the **AREA** from which to extract the data: Staging or Production.
- Select the **ASSET TYPE** you would like to extract: Hardware or Software.
- Select a **HARDWARE INVENTORY ZONE**, if applicable, by clicking on the **Inventory Zone** box, selecting the operator of choice and keying in the Inventory Zone value you would like to search on. This option is only available when extracting Hardware assets.
- Click the **INCLUDE DELETE RECORDS** box to extract deleted records as well as current records.
- To customize your **EXTRACT FILE NAME** select **CUSTOM** and key in the file name of your choice.
- Click the **EXTRACT DATA** button.



Extract Data

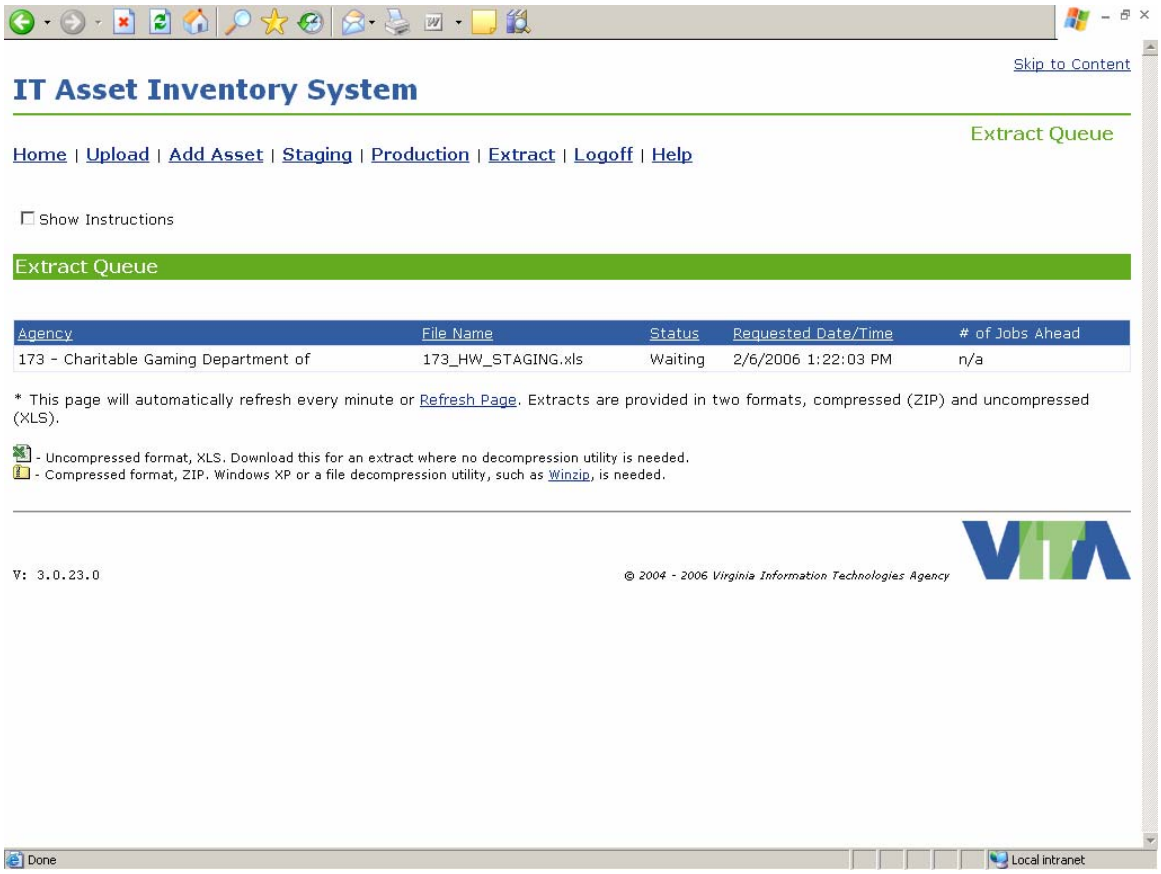
EXTRACT QUEUE

The Extract Queue shows the position and status of your agency job in the job queue.

Clicking the **REFRESH PAGE** link will display an update of your job's Status as your job waits or runs in the Extract Queue.

When your job has a **STATUS** of **COMPLETE**, you may select a view format:

- .XLS (EXCEL)
- .ZIP (Compressed, zip file format). To access and use this file, you must have an UNZIP file decompression utility installed on your PC.

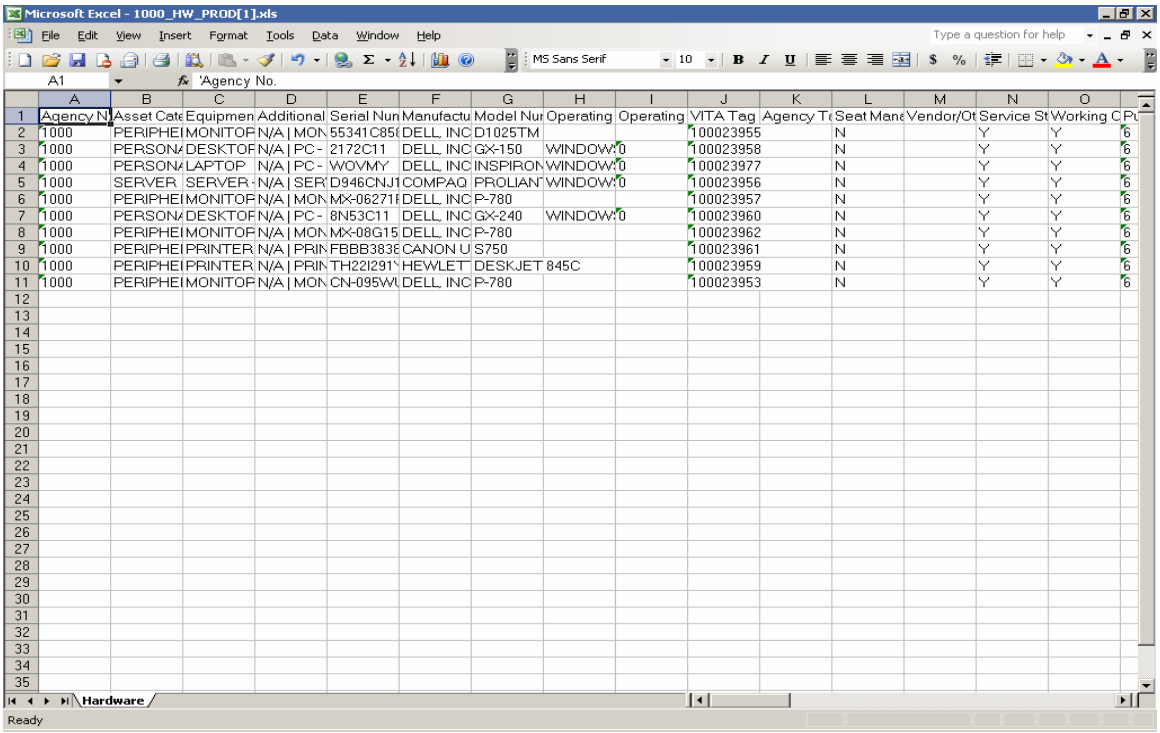


Extract Queue

Your Extract Job will remain in the job queue for 24 hours after the job has run.

Below is a display of what your extract file will look like.

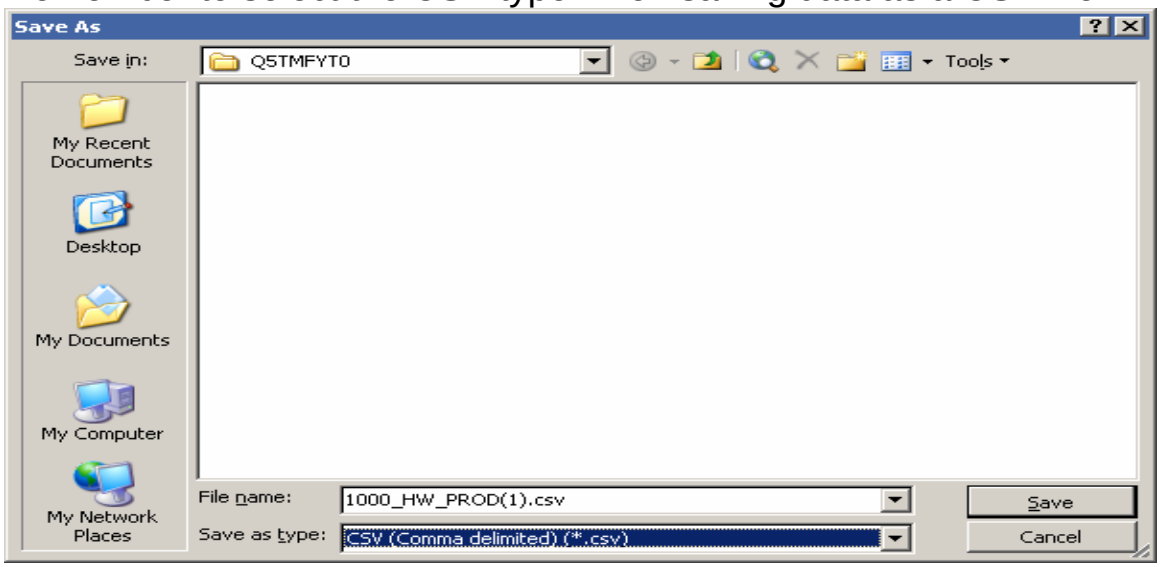
Column headings appear on the first row of the spreadsheet and the individual records follow.



Spreadsheet

The data in the spreadsheet can be edited and saved as a .CSV file ready for upload into the Staging Area.

Remember to select the CSV type when saving data as a CSV file.

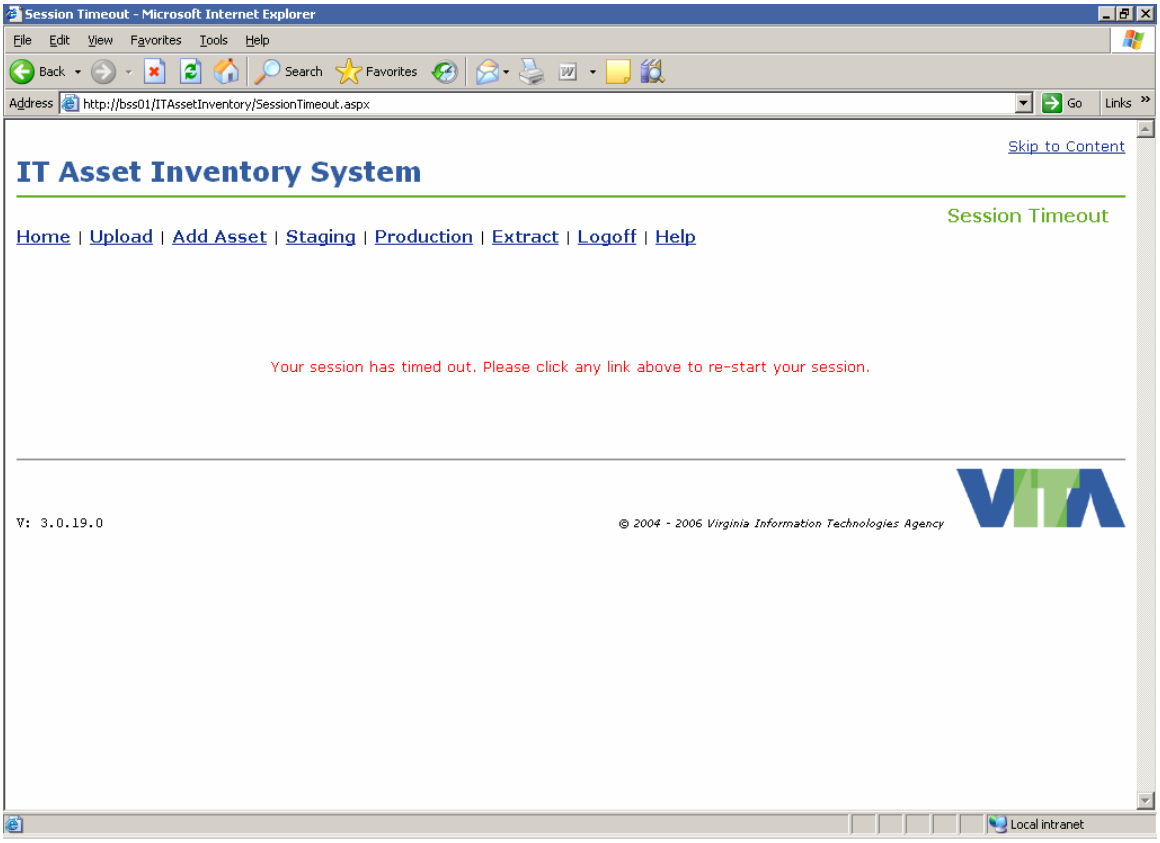


Save As

SESSION TIMEOUT

Inactivity on a particular screen will sometimes cause a **SESSION TIMEOUT** to occur.

Select the option/function at the top of the screen you wish to return to and your session will be restarted.



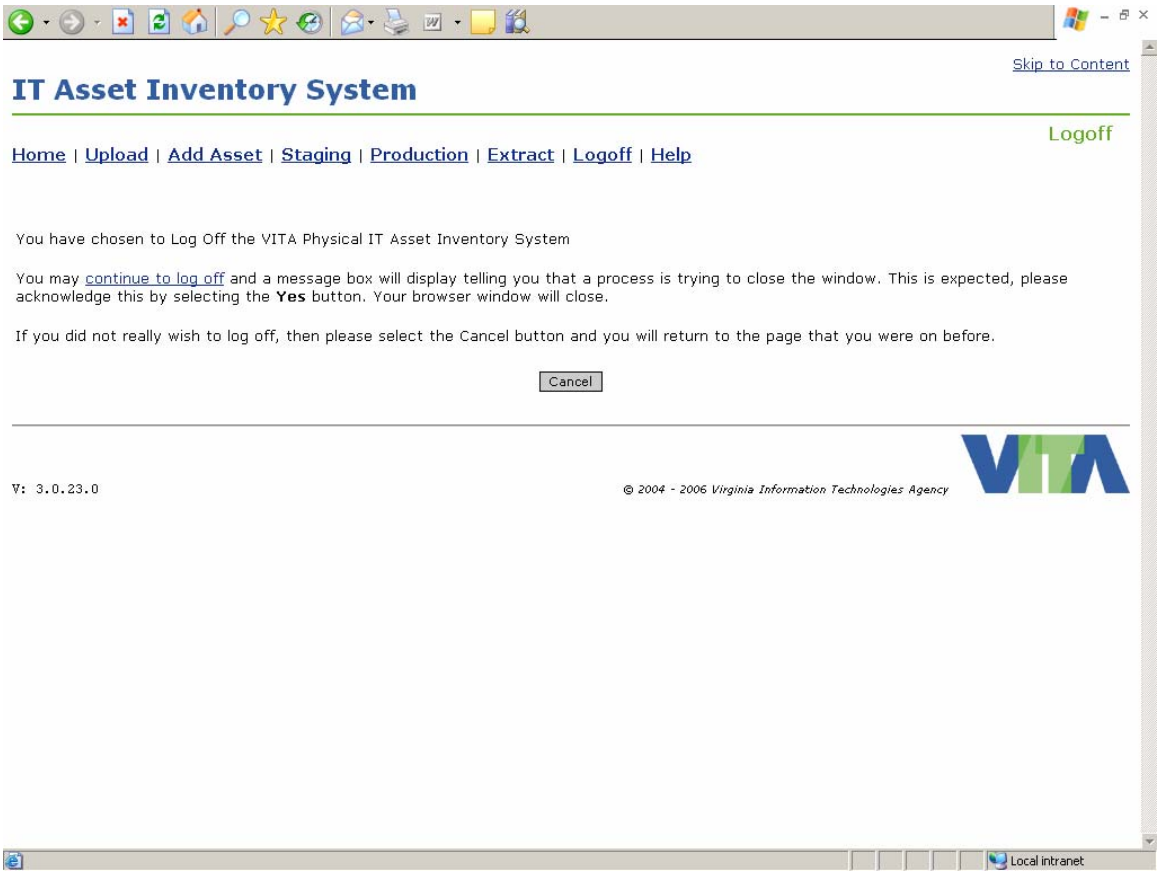
Session Timeout

LOGOFF

Select the **LOGOUT** button at the top of the screen to get out of the system.

Select **CONTINUE TO LOGOFF** link to logoff of the application or click the **CANCEL** button to return to your previous page

.



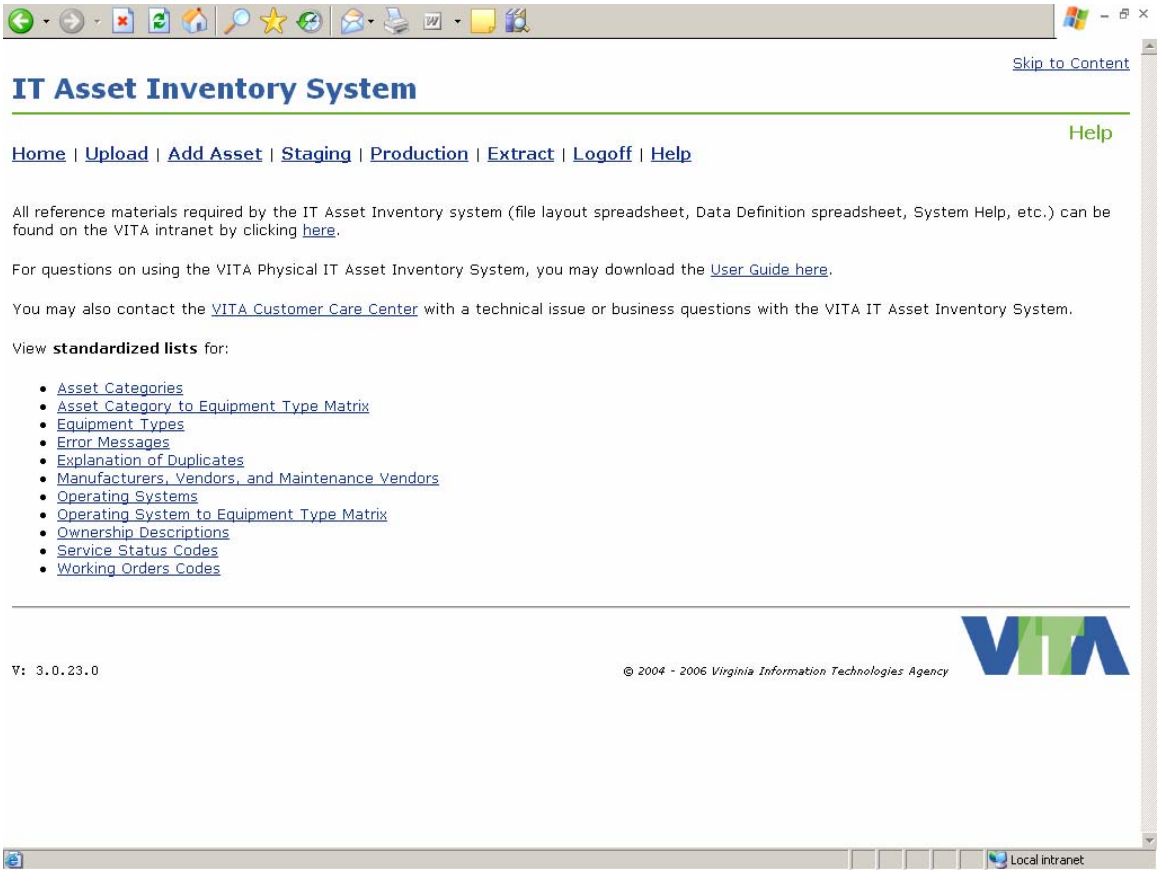
Logoff

When you select the **CONTINUE TO LOGOFF** link, a popup confirming logoff displays.

Select the **YES** button to complete the logoff process or select the **NO** button to return to the Logoff screen.

HELP

Select the **HELP** link at the top of the page to display information about the IT Asset Inventory System and where to get assistance.



HELP

All **Reference Materials** required by the IT Asset Inventory system (File Layout Spreadsheet, Data Definition Spreadsheet, System Help, etc.) can be accessed by selecting the **HERE** link above. The location is: http://www.vita.virginia.gov/docs/itAssetInventory.cfm

The **VITA CUSTOMER CARE CENTER** link will direct you to: http://www.vita.virginia.gov/vccc/ for assistance.

STANDARDIZED LISTS are available for:

- Asset Categories
- Equipment Types
- Error Messages
- Manufacturers. Vendors and Maintenance Vendors
- Operating Systems
- Ownership Descriptions
- Services Statuses
- Valid Equipment Type Conversions
- Working Orders.